

Framework and Tools for Evaluating Progress Toward Desired Policy and Environmental Changes

A Guidebook Informed by the NW Community Changes Initiative



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Cowlitz on the Move/Pathways 2020
Kids @ Heart
North Portland HEAL Coalition
North Central Oregon Public Health District
Oregon Public Health Institute

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PREFACE

Over the past decade, public health has moved upstream from direct service provision and health education campaigns to address the underlying social, environmental, and economic determinants of health behaviors. This upstream focus has been embraced by advocates working to advance policies and improve environments that enable healthy eating and active living behaviors. However, this focus has presented challenges in evaluating policy and environmental change at the community level. Advocates, researchers, and funders have realized that more sensitive measures of community change than those that traditional evaluation models typically provide are necessary to capture the progress that communities are making in creating healthier policies and environments. In addition, new skills and capacities need to be developed to identify how these changes are being achieved, and how they can be effectively communicated to key stakeholders.

In 2008, the Northwest Health Foundation launched a two-year capacity-building initiative called Northwest Community Changes to build the capacity of community coalitions to evaluate their progress of policy and environmental change. Six coalitions that had been previously funded by the Foundation's APPAN (Alliance for the Promotion of Physical Activity and Nutrition) participated in a "Community of Practice" model that involved opportunities for co-learning and direct technical assistance from evaluation professionals. While each coalition was focused on different objectives, they each contributed their insights toward refining the NW Community Changes methodology.

The following document contains a multi-component methodology for evaluating community-driven policy and environmental change initiatives, including practical, user-friendly tools that each coalition used to measure their progress, mobilize their constituents and tell their story. We hope that you find this guidebook useful as you design, launch, and evaluate your strategies to improve community health.

We would like to thank Kaiser Permanente Northwest for their generous support toward Northwest Community Changes, and Northwest Health Foundation for administering it.

OVERVIEW

In 2006, the Northwest Health Foundation established a new advised fund – Alliance for the Promotion of Physical Activity and Nutrition (APPAN) – with contributions from four health plans: Kaiser Permanente Northwest, Providence Health & Services, CareOregon and PacificSource Health Plans. Grants were awarded to seven community coalitions in Oregon and Southwest Washington working for policy or environmental changes to promote healthy eating and active living (HEAL). Most of these grants lasted four years, at \$25,000 per year. With funding from Kaiser Permanente NW, APPAN grantees were invited to participate in NW Community Changes in 2008. Six grantees agreed to participate, receiving a total of \$15,000 in additional grant funding.

NW Community Changes Objective: The primary aim of NW Community Changes was to improve community coalitions’ capacities for evaluating their progress toward desired policy and environmental changes. As depicted in Figure 1, the focus of this initiative was helping coalitions to identify and measure milestones leading to a desired policy or environmental change.

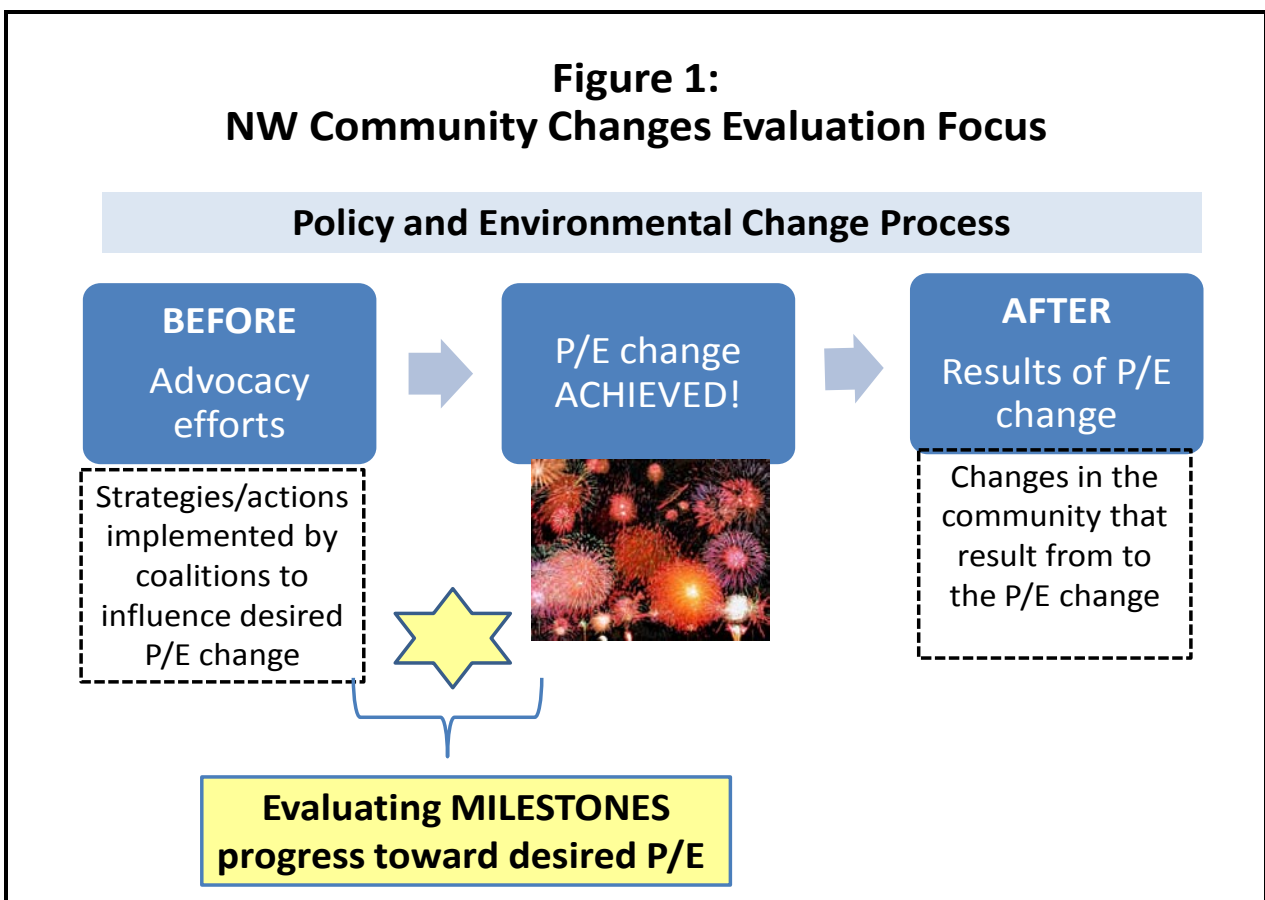


Table 1: NW Community Change Grantees

Participating Coalitions:

Each of the six coalitions was requested to:

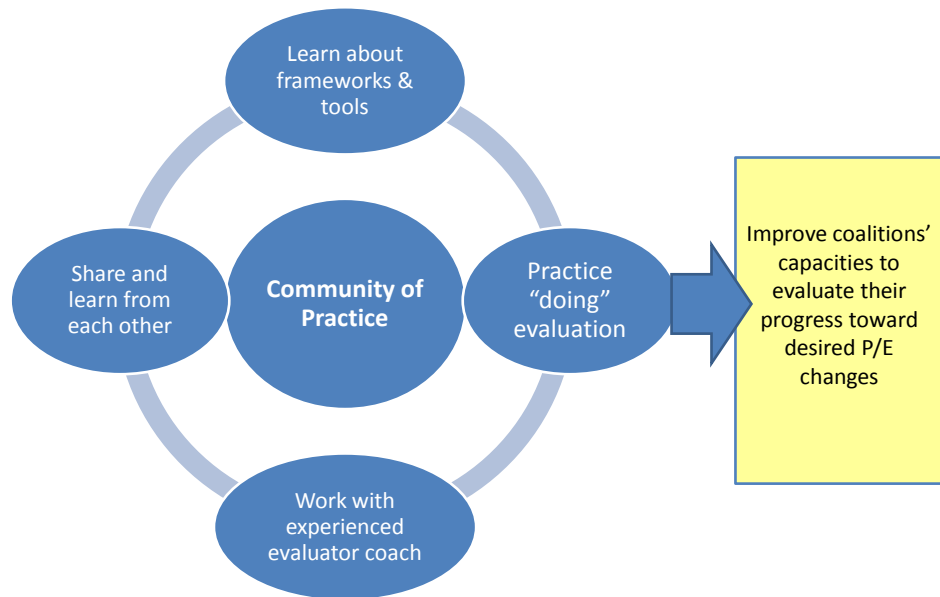
- 1) form a team of 2 to 4 individuals from their coalitions;
- 2) select one desired HEAL policy or environmental change; and
- 3) participate in a community of practice model over an 18 month period.

Benton County Healthy Weight & Lifestyle Coalition (South Corvallis)	Corvallis Community Development Dept implements elements of the South Corvallis Refinement Plan
Cowlitz on the Move (Cowlitz County, Washington)	Cowlitz County voters approve establishment of Metropolitan Park District (MPD)
North Portland Healthy Eating, Active Living Coalition (St. Johns/ Portsmouth neighborhoods)	Latino-owned corner stores in St. Johns & Portsmouth neighborhoods will stock affordable, healthy food
Kids @ Heart (Jefferson County)	509J School District adopts joint-use agreement for community use of schools
North Central OR Physical Activity & Nutrition Coalition (The Dalles)	The Dalles Little League will adopt healthy snack guidelines for games
OPHI/Healthy Portland Plan Work Group (City of Portland)	Portland’s Comprehensive Plan will include goals, objectives, & measures for health equity

Figure 2: Community of Practice Model

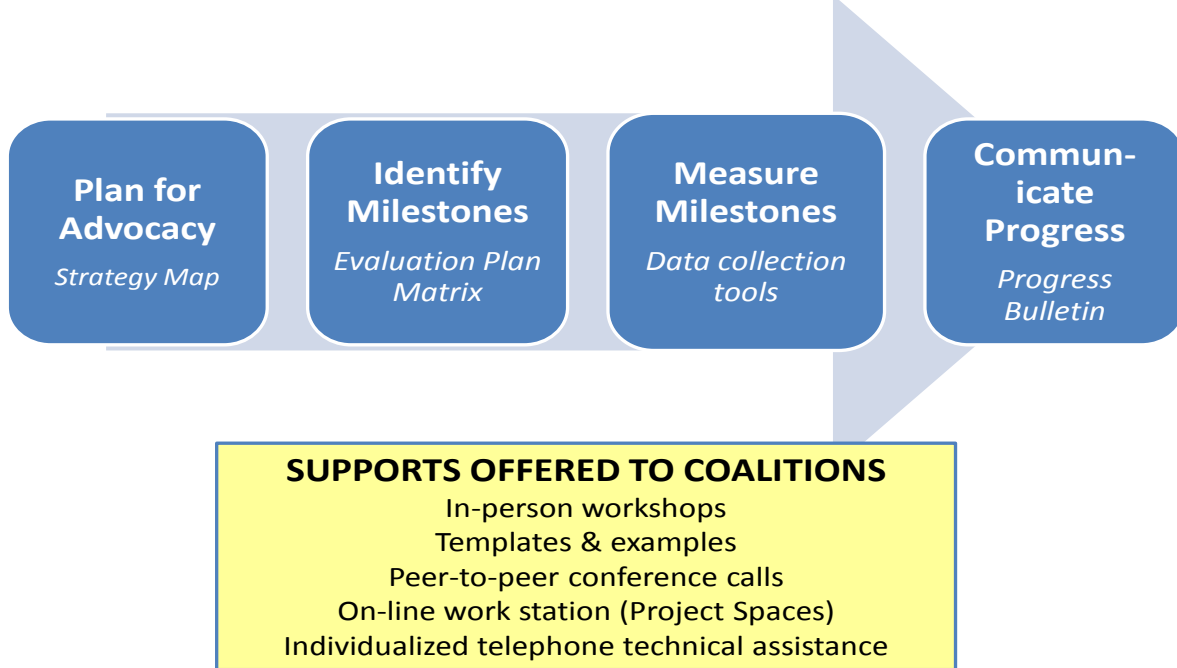
Evaluation Capacity Building Model:

The initiative was conceived as a community of practice model where coalition members would learn about evaluation frameworks and tools, practice doing evaluation, work with an experienced coach on their specific evaluations, and share and learn from each other.



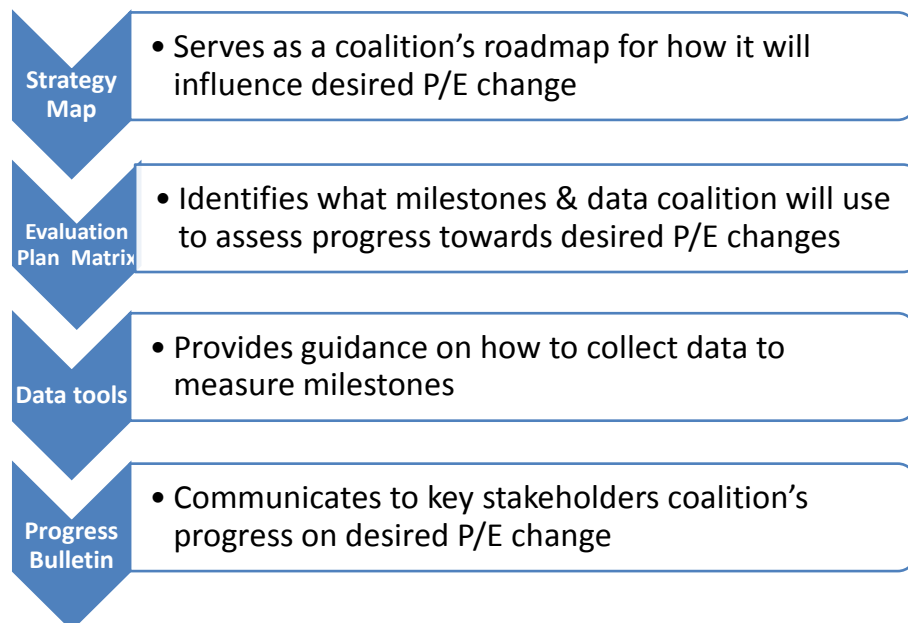
Evaluation Process: Coalitions were guided through a four-phase process: (1) Plan for advocacy using a *strategy map*; (2) Identify milestones through an *evaluation plan matrix*; (3) Collect *data* on selected milestones; and (4) Communicate progress through a *bulletin*. NW Community Changes offered supports through: In-person workshops, templates and examples; peer-to-peer conference calls; on-line workstation (Project Spaces); and individualized telephone technical assistance (Figure 3).

Figure 3: Evaluation Process



Guidebook Purpose and Outline: This Guidebook was developed to share guidance documents on and examples created by grantees for the four types of evaluation tools introduced within NW Community changes: (1) strategy map; (2) evaluation plan matrix; (3) data collection tools; and (4) progress communication bulletin (Figure 4). Each of the next four sections provides a brief guidance document on the tool and coalition-generated examples.

Figure 4: Four Evaluation Tools



STRATEGY MAP GUIDANCE

What is a strategy map?

A strategy map serves as a coalition's roadmap for bringing about one desired policy or environmental (P/E) change. A strategy map is intended to be a "living document" that is continuously revised as the strategies and political landscape shifts. Specifically, a strategy map describes the following.

- **WHAT** policy or environmental change is desired. (*This may be viewed as a goal.*)
- **WHAT** needs to happen or **WHO** needs to change (i.e., know, believe, or act differently) to achieve the desired P/E change. (*These may be viewed as objectives.*)
- **WHY** the desired P/E change will benefit the community. (*This may be viewed as the rationale.*)
- **HOW** the coalition seeks to influence the desired P/E change. (*These are actions/strategies.*)



Why develop a strategy map?

1. As a **planning tool**, a strategy map CLARIFIES what P/E change is desired, why the change is important, and how the change will be achieved. The map can form the foundation for a grant proposal and/or work plan.
2. As a **communication tool**, a strategy map COMMUNICATES to coalition members and external stakeholders the coalition's plans for P/E change.
3. As an **evaluation tool**, a strategy map identifies and selects important MILESTONES to track progress toward the desired P/E change.

What is needed to draft a strategy map?

1. A group of individuals who are willing to brainstorm about and provide feedback on the map.
2. A person responsible for facilitating the group and drafting versions of the strategy map.
3. A document to capture the strategy map elements, such as attached Template A.

What are the steps to draft a strategy map as a PLANNING TOOL?

There are four iterative, non-linear steps to develop a strategy map.

Step 1: Clarify the desired policy or environmental change (P/E change).

Question: WHAT is the policy or environmental change our coalition seeks to achieve?

Guidelines to consider:

- Select a P/E change that is meaningful (IMPORANT) and for which your coalition may be able to influence (FEASIBILITY).
- Draft one sentence that describes WHAT is the P/E change and WHO has authority to make the change.
- Be specific as possible, so everyone understands/agrees upon the desired P/E change.

Example of P/E change: County commissioners enact a menu labeling ordinance.

Step 2: Explain the benefits of the desired P/E change to your community.

Question: WHY will our community be better off AFTER the P/E change has been achieved?

Guidelines to consider:

- In bullet form, list how the community is expected to be better off because of the P/E change.
- List meaningful benefits that will appeal to key stakeholders. Fewer may be better than many.
- Be specific as possible.

Example of benefits from a menu labeling ordinance:

- Residents will make informed decisions about purchasing food from restaurants.
- Consumers may consume healthier foods when dining out.
- Restaurants may offer healthier food options or remove or reformulate unhealthy options.

Step 3: Identify interim steps of change that will lead to the desired P/E change.

Question: WHAT needs to happen and/or WHO needs change (i.e., think, believe, or act differently) BEFORE the desired P/E change can be achieved?

Guidelines:

- The “what” can be a process, function, or document.
- (The “who” can be individuals (e.g., the mayor, community members) or institutions (e.g., the media, parks and recreation department).
- When describing “the who,” be clear about how your coalition wants them to change in terms of how they think, believe, or act in order to influence the desired P/E change.
- Be specific as possible.

Example interim step of change for menu labeling ordinance:

- One county commissioner becomes an advocate for menu labeling.
- County residents advocate commissioners for menu labeling.
- Local newspaper publishes stories or op-ed pieces on benefits of menu labeling.

Step 4: Select strategies to influence desired changes.

Question: What strategies/actions will our coalition implement to influence the desired changes?

Guidelines:

- Review the interim steps of change.
- Brainstorm strategies or actions that your coalition can implement to influence interim steps of changes.
- Select strategies that are most potent and feasible for your coalition to implement.

Example strategies for influencing menu labeling ordinance:

- Meet one-on-one with county commissioners who may be an advocate.
- Collaborate with local dietician association to encourage members to e-mail, meet, or call county commissioners.
- Write letters to the editors or op-ed pieces for the local newspaper.

What are the steps for transforming the strategy map into a COMMUNICATION TOOL?

- After your coalition has drafted/revised the strategy map as a planning tool, perhaps using the attached template, then the planning tool may be transformed into a communication tool.
- As a communication tool, the strategy map is transformed into more of a visually appealing illustration that captures the “big picture ideas” of the strategy map with fewer details.
- Using Word (or some other type of word processing or design program), colored boxes and arrows can be used to represent the links among strategy map elements.
- The strategy should fit on one page.
- The elements displayed in the strategy map should be readily understandable to others not involved in the coalition’s efforts and could be accompanied by a 30 second elevator speech.

How is the strategy map used as an EVALUATION TOOL?


The next section provides guidance on how to use the strategy map for developing an evaluation plan matrix.

What are examples of strategy maps as communication tools?

The following pages include examples of coalition-generated strategy maps.

Template A: STRATEGY MAP

A roadmap for how your coalition plans to influence a desired P/E change

HOW	WHAT/WHO	WHAT	WHY
Strategy ④	Interim Steps of Change ③	Policy or Environmental Change ①	Community Benefits ②
<i>What strategies/actions will our coalition implement to influence desired changes?</i>	<i>What needs happen or Who needs change (i.e., think, believe, or act differently) BEFORE the desired P/E change can be achieved?</i>	<i>What is the policy or environmental change our coalition seeks to achieve?</i>	<i>Why will our community be better off AFTER the policy or environmental change has been achieved?</i>
			

South Corvallis Refinement Plan Strategy Map

HOW will the Benton County Healthy Weight and Lifestyle Coalition advocate for implementation of the South Corvallis Refinement Plan?

WHAT targets need to be reached to implement the South Corvallis Refinement Plan?

Desired Policy Change

WHY will South Corvallis residents be better off when elements of the Refinement Plan are implemented?

Build sustained **advocacy base** of South Corvallis residents

South Corvallis residents:

- Assess HEAL conditions via conscious raising actions
- Improve their advocacy skills
- Become “champions” to advocate for implementation of Plan

Convene and build **partnerships** with city and community-based organizations

Community partners support implementation of So. Corvallis Plan

Encourage **media** to report on implementation of So. Corvallis Refinement Plan

Media relies on partners for information on So. Corvallis Plan
Local media publishes news stories, features, op-eds, or letters to the editor on the So. Corvallis Plan

Develop relationships, educate, and advocate **Corvallis Development Department Staff** to implement elements of Plan

Corvallis Development Dept. staff & city officials are:

- Aware of food access/options for active living in So. Corvallis
- Aware of resident support for implementing So. Corvallis Refinement Plan

Educate **city officials** – City Parks Advisory Board, Transportation & Bicycle Advisory Board, and City Council members



Corvallis Development Department implements elements of the South Corvallis Refinement Plan

South Corvallis residents will have ownership for prioritized healthy eating and active living elements in the So. Corvallis Refinement Plan

South Corvallis will have:

- a Town Center – a neighborhood commercial district with a full-service grocery store
- an 8 mile multi-use path that serves both transportation and recreation/open space needs
- Improvements to existing parks and development of 4 new neighborhood parks
- Safe crossings and “people friendly” places along Third Street

Cowlitz County Metropolitan Park District Strategy Map

DESIRED POLICY CHANGE: Cowlitz County voters approve establishment of a Metropolitan Park District (MPD) to fund and sustain parks, trails, and recreation programs

BACKGROUND: In 2009, officials from Cowlitz County and Kelso, Longview, Woodland, and Castle Rock cities met at a Government Summit to problem solve the reduced revenue available to sustain services. Parks were identified as a high priority. A Summit Parks Committee comprised of appointed citizens & government representatives began meeting to investigate the feasibility of forming a: Park & Rec District; Park & Rec Service Area; and Metropolitan Parks District in April 2009.

HOW will the Summit Parks Committee do its work (i.e., actions)?

WHAT targets need to be reached to move forward on the MPD?

WHY will Cowlitz County be better off with a Metropolitan Park District?

Research options, legal requirements, & tax/budget considerations
APRIL 2009 – MAY 2010

Summit Parks Committee proposes MPD strategy
MAY 2010

Hold workshops with members from parks & rec board, city councils & BoCC on proposed MPD strategy
MAY – JUNE 2010

Parks & rec boards vote to endorse proposed MPD strategy
JUNE-JULY 2010

Work with county prosecutor to draft MPD resolution
JUNE 2010

Each city council & BoCC vote to endorse MPD resolutions
JUNE-JULY 2010

Submit SEPA
AUGUST 2010

SEPA review completed
OCTOBER 2010

Submit resolution to Boundary Review Board
AUGUST 2010

Boundary Review Board Approved
NOVEMBER 2010

Decide whether to take to vote; and if so, form citizens campaign committee to advocate for resolution
WINTER 2010

Cowlitz voters approve MPD resolution on Special Election Day
FEBRUARY 8, 2011

IMPROVE PARKS & RECREATION and TRAILS SYSTEM

- Dedicated funds to maintain and keep parks and recreation programs open.
- County and city trails will be maintained and new trails developed.
- County and city trails will be connected.
- Long range facility planning will occur.
- Alternative transportation options will be provided.

HEALTHIER COWLITZ COUNTY RESIDENTS

Reduced chronic disease by providing more opportunities for community residents to engage in physical activity

Kids @ Heart Joint Use Agreement Strategy Map

HOW will Kids @ Heart work for desired policy changes (e.g., strategies)?

WHAT targets need to be reached to move forward on joint use agreements?

Desired Policy Changes

WHY will Jefferson County/City of Madras be better off with joint use agreements?

Conduct **research** on joint use agreements & Jefferson County obesity problem

Seek **grant funding** for community schools in Jefferson County

Build **relationships** with Jefferson County/Madras policy makers and facilitate Westside Task Force

Mobilize Jefferson County/Madras **like-minded organizations** (HEAL, CHIP, ACHIEVE) to advocate for joint use

Encourage local **MEDIA** to report on strategic plan/joint use agreements

Draft **joint use policy** and make **presentation** to 509 J district school board and Madras city council

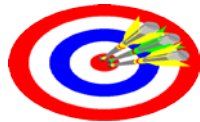
Obtain funding to support/ implement community schools/community center

509 J Superintendent and Madras Director of Community Development become champions for joint use agreements

Like-minded organizations advocate 509 J school board and city officials for joint use agreements

Local media publishes news stories, features, op-eds, or letter to editors on Kids @ Heart policies & joint use

509 J school board & Madras city council members become aware of need for joint use agreement



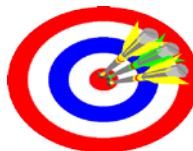
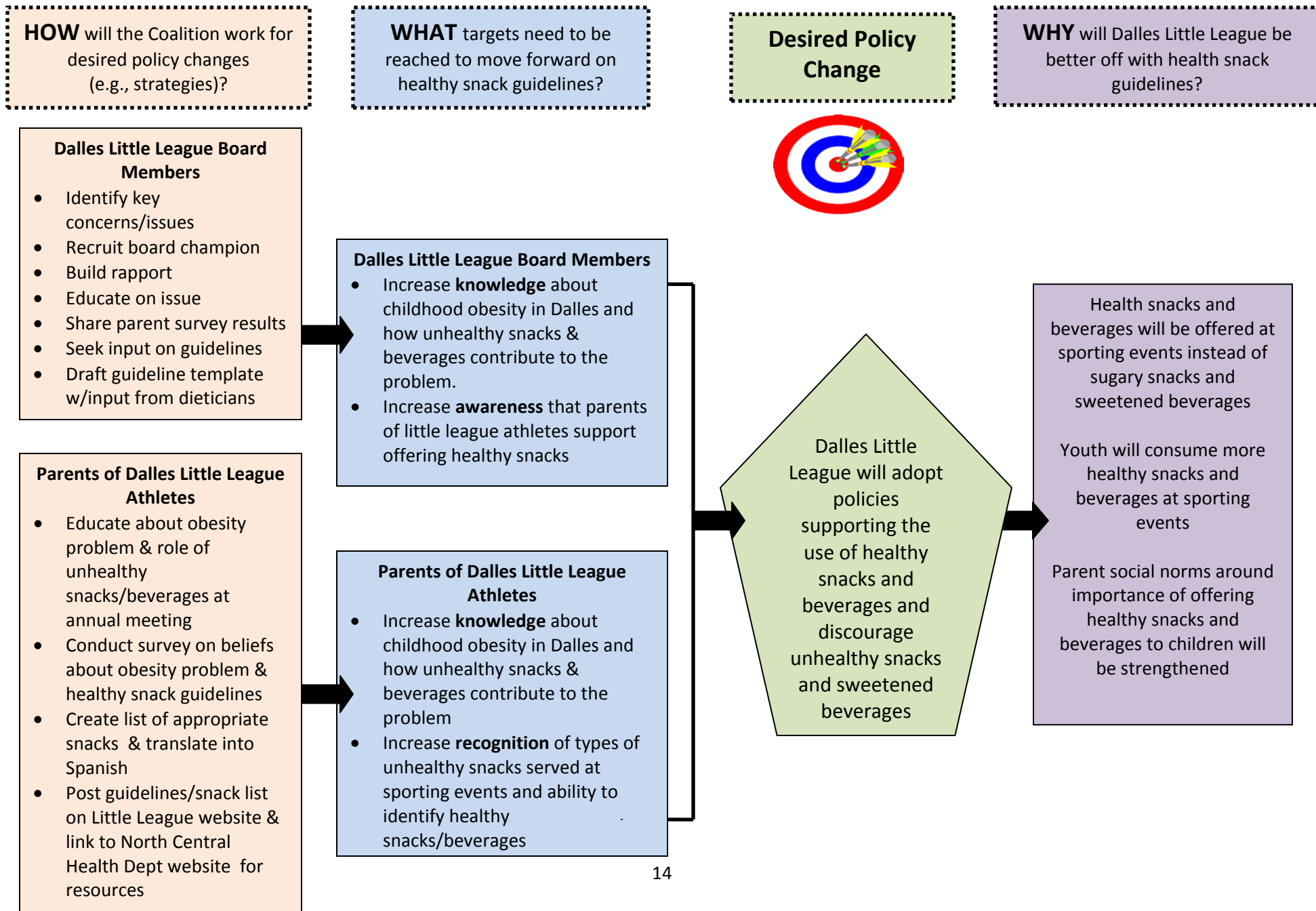
509 J District adopts policy for joint-use agreements for community use of all 15 school facilities for healthy eating active living and special provision for Westside Elementary

Madras City Council agrees to maintain Westside Elementary property

Lay foundation for Westside Elementary to serve as **community center** for City of Madras and eventual Parks & Recreation District Office

Lay foundation for healthy eating active living **afterschool/weekend programs** to be offered at 509 J district schools

North Central Oregon Physical Activity and Nutrition Coalition The Dalles Little League Healthy Snack Policy Strategy Map



North Portland HEAL Coalition Healthy Latino Corner Store Strategy Map

HOW will the Coalition work for desired policy changes (e.g., strategies)?

WHAT targets need to be reached to encourage convenience stores to stock health, affordable foods?

Desired Environmental Change

WHY will St. Johns and Portsmouth Neighborhoods be better off?

- LATINO STORE OWNERS**
- Develop criteria & select targeted neighborhoods & stores
 - Conduct formative work with Latino businesses
 - Outreach & present business case to Latino convenience store owners
 - Conduct structured observation & photography of 4 selected stores
 - Identify culturally appropriate, affordable healthy foods
 - Propose environmental changes to stores
 - Provide incentives to stores

- LATINO STORE OWNERS**
- Increase awareness of HEAL and common ground
 - Increase knowledge of what healthy foods will be purchased by residents
 - Increase knowledge/skills of how profits can be made from stocking affordable healthy foods
 - Identify top sources of product revenue
 - Improve relationships between Latino business owners and residents
 - Improve stores' environmental conditions to stock healthy foods

- COMMUNITY RESIDENTS**
- Recruit community residents to serve as champions
 - Engage in CBRP by conducting structured observations
 - Assess current purchasing practices of healthy foods & identify what healthy foods that residents would purchase
 - Develop marketing strategy

- COMMUNITY RESIDENTS**
- Increase willingness to purchase healthy foods from convenience stores
 - Advocate/request store owners to stock affordable healthy foods
 - Healthy foods can be easily identified by residents



Latino-owned convenience stores in St. Johns and Portsmouth neighborhoods will stock affordable healthy foods

Community residents will increase consumption of fruits and vegetables and other healthy foods

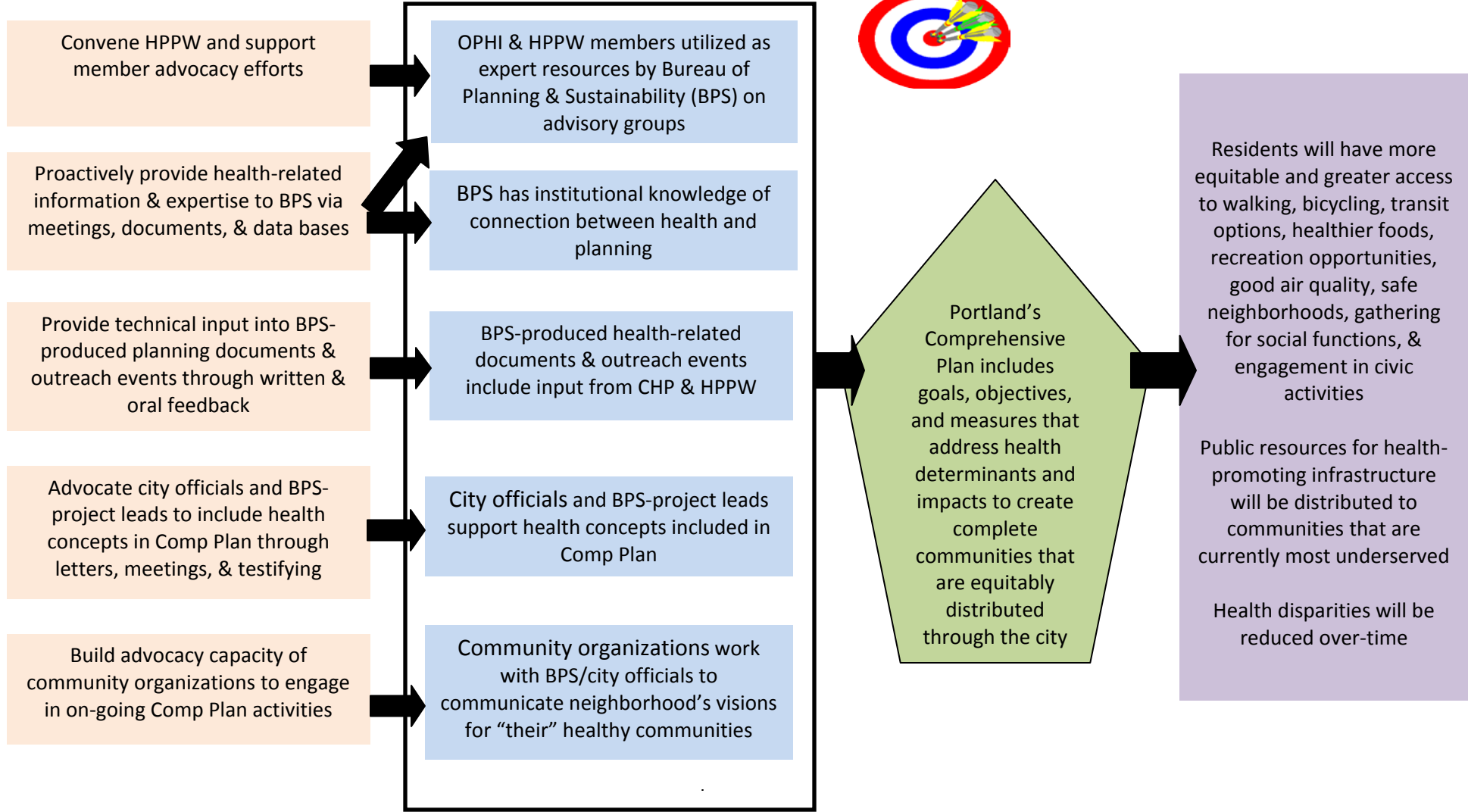
Healthy Portland Plan Strategy Map

HOW will OPHI & Healthy Portland Plan Work Group (HPPW) advocate for a Comprehensive Plan that includes health objectives, activities & measures?

WHAT interim steps of change need to be reached for the Comp Plan to include health objectives, activities, and measures?

Desired Policy Change

WHY will Portlanders be better off with a Comprehensive Plan that includes health objectives, activities and measures?

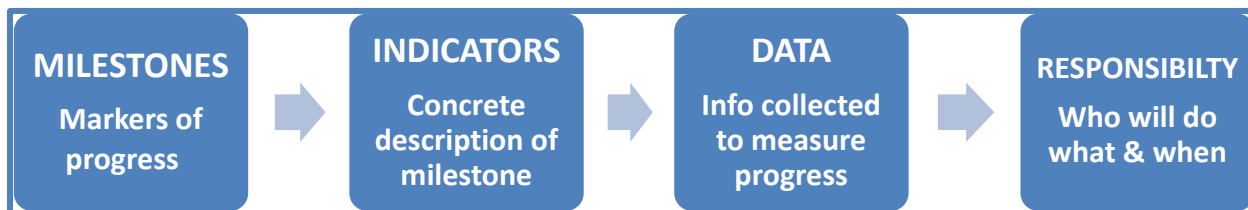


EVALUATION PLAN MATRIX GUIDANCE

What is an evaluation plan matrix?

Achieving a desired P/E change may take years. An evaluation plan matrix serves as a concise, proactive blueprint for how your coalition will assess **progress towards** the desired policy or environmental (P/E) change. An evaluation plan matrix is intended to be a “living document” that is continuously updated to reflect changes in strategy or the political landscape. It describes the following.

- **MILESTONES:** Significant markers to help the coalition to track whether it is making progress toward desired P/E change or veering off course. Milestones are selected from the strategy map – strategies/actions implemented by the coalition or interim steps of change.
- **INDICATORS :** Concrete descriptions of milestones enabling data to be collected to determine whether milestone is being met or not;
- **DATA COLLECTION STRATEGY:** How information will be collected to measure progress on the milestone;
- **RESPONSIBILITY:** Who will be responsible for collecting the data and when.



What is needed to develop an evaluation plan matrix?

1. A strategy map previously drafted for the desired P/E change.
2. A group of individuals willing to brainstorm about and provide feedback on the matrix.
3. A person responsible for facilitating the group and drafting versions of the matrix.
4. A document to capture the matrix elements, such as Template B (page 19).

What are the steps to develop an evaluation plan matrix?

Step 1: Select important milestones to tracking progress toward desired P/E change.

- Review the first two columns in your strategy map that list strategies/actions to be implemented by the coalition and interim steps of change. Any element listed in either of these two columns is a potential milestone because they denote a pathway toward influencing the desired P/E change.
- Brainstorm which of the elements listed in the strategy or interim steps of change may be important milestones for which the coalition will invest some resources to track progress. Table 2 may be a helpful tool for this brainstorming element.

TABLE 2: Milestone Selection

POTENTIAL MILESTONE	STAKEHOLDERS Who needs to be informed about the status of this milestone?	UTILITY How will the coalition use info about this milestone?	FEASIBILITY How feasible will it be to collect information on this milestone?	PRIORITY High Medium Low

- From this brainstorming exercise, select a reasonable number of milestones for which the coalition will devote reasons to tracking.

Example milestone (interim step of change) for county menu labeling ordinance:

- County residents advocate commissioners for menu labeling.

Step 2: Identify indicators (concrete descriptions) and data collection strategies for each of the selected milestones.

- Milestones can be vague (e.g., Community members increase their support for public parks). Indicators help transform the vague milestones into concrete descriptions for which data can be collected and measured.
- For each selected milestone, brainstorm several indicators that are reasonable representations of the milestone.
- For each indicator, brainstorm how data may be collected to measure it. Table 3 provides examples of milestones and indicators.

Example Indicators:

- Number of contacts made to county commissioners by local dietician association.
- Number of residents attending county commission hearing who advocate for the ordinance.

Table 3: Indicator and Data Collection Strategy Selection

Selected Milestone	Possible Indicators	Possible data collection strategies

- Based on this brainstorm table, select one to two indicators for each selected milestone.

Step 3: Write milestone, indicator, and data collection elements into evaluation plan matrix and identify who will do what by when.

- The attached Template B may serve as the evaluation plan matrix.

What are examples of evaluation plan matrices?

The following pages provide examples of evaluation plan

Template B: EVALUATION PLAN MATRIX

A blueprint for how your coalition will assess progress toward desired P/E change

Milestone	Indicators	Data Collection Strategy	Responsibility	
			When data collected	Who will do what
1.				
2.				
3.				

Benton County South Corvallis Refinement Plan Evaluation Plan Matrix

Milestone	Indicators	Data Collection Strategy	When data collected	Who will collect Who will analyze
Build a network of community residents to lead advocacy efforts for healthy eating active living policy and environmental change outlined in the South Corvallis Refinement Plan.	<p>Number of self identified community advocates</p> <p>Number and type of advocacy actions residents engage in (e.g., meetings attended, letters written, telephone calls made)</p>	<p>List and contact information for self-identified community advocates</p> <p>Tracking sheet of major efforts/steps taken</p>	October-September	Gillespie/Parsons/Patton-Lopez
Community residents undertake “conscious raising” actions to document So. Corvallis HEAL issues (focus groups/scans)	<p>Number & type of residents participating in conscious raising activities</p> <p>Number and type of key themes identified regarding neighborhood assets and barriers</p>	<p>Facilitators log to captures key themes and elements from popular education discussion groups and neighborhood walkabouts with Latino residents in SC</p> <p>Assessment Tool Tracking log for mail-in survey to low-income residents in S. Corvallis</p>	<p>March –May</p> <p>May –June</p>	<p>Patton-Lopez</p> <p>Patton-Lopez/Goeke</p>

Cowlitz on the Move – Metropolitan Park District Evaluation Plan Matrix

Desired Policy Change	Milestones	Indicators	Data Collection Strategies
<p>Voters approve formation of a Metropolitan Parks District (MPD) to provide sustaining funds for parks and trails in Cowlitz County</p>	<p>1) Executive Summit (County Commissioners and local elected officials) continue study on the benefits of a Metropolitan Park District</p> <p>2) Planning Team recommendation to Executive Summit on design and interest in formation of MPD.</p> <p>3) Workshop presentations are made and cities and county decided whether or not to be part of a MPD</p> <p>4) Citizens Campaign Committee formed and implements strategies to voters to approve tax to create MPD at November 2, 2010 general election</p> <p>5) MPD formed, taxes collected and local parks and trails are maintained</p>	<p><u>Milestone 1</u></p> <ul style="list-style-type: none"> • Planning team researches legal requirements to form a MPD • Planning team prepares recommendation for Executive Summit • Continued study is approved <p><u>Milestone 2</u></p> <ul style="list-style-type: none"> • # of MPDs identified in state • # of MPDs respond to survey on why and how they were formed • MPD design model approved by planning team • Executive Summit approves model <p><u>Milestone 3</u></p> <ul style="list-style-type: none"> • # of workshop presentations made • # of cities who agree to be part of MPD • Ballot measure to collect tax and for MPD written <p><u>Milestone 4</u></p> <ul style="list-style-type: none"> • # of citizens on Campaign Committee • Campaign Committee registers with Public Disclosure Commission • # number of presentations to voters or community groups • 5 citizens file for seats on MPD 	<p>Written proposal</p> <p>Executive Summit meeting notes</p> <p>Surveys</p> <p>Written proposal</p> <p>Presentation outline</p> <p>City council minutes</p> <p>Voter's Guide</p> <p>PDC Reports</p> <p>Voter's Guide</p>

Kids At Heart Joint Use Agreement Evaluation Plan Matrix

Milestone	Indicators	Data Collection Strategy	When data collected	Who will collect
<p>Students support using after school facilities and programs for activities involving healthy eating and active living</p>	<p>No. & % sixth graders supporting increased afterschool programs involving sports and recreation. Total responses = 204</p> <p>Question: If your school's indoor gym facilities, playing fields, and/or playgrounds were open during the weekends, how interested would you be in using them?</p> <p>Response: 76% were somewhat to very interested, or 149 students</p> <p>Question: What may prevent you from participating in afterschool activities and/or using school facilities during the weekends?</p> <p>Response: Nothing would prevent me...I would very likely use my school to recreate if it was available – 32.9% or 55 Lack of transportation – 23.4% or 39</p>	<p>Survey given to 200 6th grade students</p>	<p>May, 2010</p>	<p>Kids@Heart - Kate Wells</p>
<p>Community stakeholders support increasing opportunities for physical activity and recreation through joint-use agreement</p>	<p>Question: Of the following strategies, please indicate which are needed, realistic and likely to significantly increase PHYSICAL ACTIVITY behaviors among children, youth and families in your community?</p> <p>Answer: Policies that support opening and promoting use of school playgrounds and gyms after school hours – 57.1% or 8.</p>	<p>Survey given to over 100 community partners and stakeholders as part of Kids@Heart community needs assessment – 70 responses collected</p>	<p>July, 2010</p>	<p>Kids@Heart – Kate Wells</p>

North Central OR Physical Activity & Nutrition Coalition – The Dalles Little League Healthy Snack Guideline Evaluation Plan Matrix

Milestone	Indicators	Data Collection Strategy	When data collected	Who will collect Who will analyze
Recruit Little League board member champion COMPLETED	Board president allowed access to meetings/educational workshop	N/A	N/A	N/A
Hold education sessions with parents of little league athletes COMPLETED	# parent athletes attended	Notes	March 2010	Allyson
Conduct survey with parents of little league athletes to identify beliefs & support for policy COMPLETED	# completed survey % parents concerned about obesity in Dalles & unhealthy snacks at games % parents who support proposed guidelines	Conduct parent survey at spring orientation meeting	March 2010	Allyson
Dalles Little League Board adopts healthy snack guidelines COMPLETED	Board makes decision to approve and guidelines posted on web site	N/A	N/A	N/A
Parents of little league athletes follow healthy snack guidelines (Implementation)	% parents aware of healthy snack policy % parents accessed website & reviewed policy/snack list % parents observe healthy snacks and beverages offered at games	Conduct survey with sample of parents at several (2 or 3) little league games	Spring/Summer 2011	TBD

**North Portland HEAL Coalition
Latino Healthy Retail Network
Evaluation Plan Matrix**

Selected Milestones	Indicators	Data Source
1. Conduct structured observations of 4 Latino stores	Identify availability of healthy foods in stores	Structured observation form including photography
2. Conduct structured interviews of 4 Latino store owners	Identify barriers to increase healthy food options	Structured interview form
3. Conduct grant application process for store owners' incentives	Identify store owners' needs to increase availability of healthy foods in stores	Attendance to mini-grant workshop and completion of application form

OPHI/Healthy Portland Plan Work Group Evaluation Plan Matrix

Selected Milestone	Indicators	Data Source	Milestone Assessment as of August 2010*
Recruit & mobilize influential stakeholders to actively serve on Work Group	# work groups members Members represent key stakeholder groups # work group meetings held Average work group member attendance at meetings BPS planner co-facilitate work group	Meeting minutes	<i>-Work group comprised of more than 80 members with representation from: public health (non-profit and public agencies), health systems, senior advocacy, parks and greenspace, town squares, local food access, transportation, urban planners</i> <i>-Held 7 work group meetings, with average attendance of 12 members; attendance declining over time</i> <i>-BPS planner serves as co-facilitator</i>
Work group viewed as expert resource to BPS planners	# of BPS/city-convened committees or task forces where Work Group members invited to participate	Communication with work group members	<i>Work group members participate on three BPS-city convened committees, with one member appointed to co-facilitate the Health, Food & Safety Technical Action Group</i> <ul style="list-style-type: none"> • Co-chair and members on the Health, Food, and Safety Technical Action Group (3 members) • Mayor's Planning & Sustainability Cabinet (3 members) • Mayor's Portland Plan Advisory Committee (3 members)
Provide technical input on BPS-produced documents	# of documents for which BPS planners requested Work Group member input # of work group members who provided input on BPS-produced documents	Document log	<i>Work group members provided substantial input on 6 BPS documents</i> <ul style="list-style-type: none"> • PP Technical Working Group Report (2/08) • Health and Human Safety one-pager (4/08) • Health and Human Safety Existing Conditions Background Report • Health & Human Safety Fact Sheet (9/09) • Round I & II public workshop materials (8/09, 5/10) • Draft goals, objectives, and measures for each of 7 Health Directions
BPS-produced documents include input from Work Group members	% significant edits/ recommendations from work group members incorporated into the final Health and Human Safety Existing Conditions Background Report Reframe report from individual to environmental focus	Comparative review of draft and final docs	<i>-59% of Work Group members' comments were incorporated into the final Health and Human Safety Existing Conditions report</i> <i>-Shifted content/framework of report from focus on individual behaviors to environment; highlight disparities; and recommendations accepted</i>
Provide information/resources to BPS planners	# of written information on health-related topics given to BPS planners # of times work group members gave presentations to BPS staff on health-related topics	Project Director calendar	<i>Provided numerous written documents/data sets given to BPS on health related topics</i> <ul style="list-style-type: none"> • Documents distributed on connections between planning & health, tools to measure planning, social and built determinants of health and outcomes • Data sets distributed on social and built determinants of health and health outcomes <i>Work group members made 2 presentations to city/metro staff on health-related topics</i> <ul style="list-style-type: none"> • All BPS staff on health planning (10/08) • Brown bag at Metro on integrating public health into public plans

DATA COLLECTION GUIDANCE

Why collect data to track milestones?

Rather than relying solely on individual stories or personal opinions, collecting data to track progress toward a desired policy or environmental (P/E) change can be useful for the following reasons.

1. May be a more valid source of information for which the coalition can assess its progress.
2. Provides a structured opportunity for a coalition to reflect and make process improvements.
3. Offers more convincing information to key stakeholders about the coalition's efforts and impact.

What are some examples of data collection strategies for P/E change milestones?

The following table lists some data collection tools developed or used by the coalitions participating in NW Community Changes, as well as some other tools generated by others.

Data collection tool	Description
(1) Advocacy capacity assessment	A tool for coalitions to assess and monitor progress on their internal capacity for advocacy
(2) Champion tracking	A tool for tracking the recruitment, engagement, and diversity of champions for the P/E cause
(3) Comparative document review	A tool for assessing the impact of coalition's efforts to revise external documents
(4) Convenience store check list	A tool for assessing corner store infrastructure and selling/marketing of healthy foods
(5) Constituent survey	A tool for assessing constituent support, knowledge, beliefs, or attitudes about an issue
(6) Presentation refinement tool	A quality improvement tool for presentations

(1) Advocacy Capacity Assessment

Background/Purpose: When pursuing policy or environmental changes, coalitions may come to the realization that they need to build their internal capacity to be successful advocates. The purposes of the Advocacy Capacity Assessment Tool are for coalitions to: (1) take stock of their current capacity; (2) use the data

Description: The Alliance for Justice developed this Tool. For a small fee, coalition leaders and/or members can complete the mostly quantitative Tool either on-line or on hard copy. The Tool is organized around nine broad indicators of capacity:

- Decision-making structures
- Advocacy agenda
- Organizational commitment to and resources for advocacy
- Advocacy base
- Advocacy partners
- Advocacy targets
- Media skills and infrastructure
- Advocacy strategies
- Knowledge, skills, and systems to effectively implement strategies

Some example questions include:

(ADVOCACY BASE) *The organization has a system for communicating with its networks to share information about its agenda and pending actions.* Response: YES or NO

(ADVOCACY PARTNERS) *The organization serves as a regular resource for other stakeholders on its policy issues.*

Responses: (1) True and well functioning; 2) True, but needs strengthening; 3) Not True, but in progress, (4) Not True, but under consideration; and (5) Not True, and not desired.

For More Information: Contact Alliance for Justice, Washington DC. To order electronic tools, e-mail fai@afj.org or call 1-866-675-6229. Annual electronic fee for 1 -5 non-profit groups is \$150. To order hard copy tools for \$60, visit <http://www.advocacyevaluation.org>

(2)Champion Tracking Tool

Background & Purpose: Encouraging community residents, elected officials, or youth to become champions for community issues is a classic advocacy strategy. The Champion Tracking Tool is an efficient way to track progress of coalition efforts to recruit, engage, and encourage champions to act on behalf of a P/E change.

Method:

- Based on your coalition’s strategy for recruiting or mobilizing champions, identify the champions (e.g., middle school students, neighborhood residents).
- Identify what is important to your coalition to track about champions – the number, the type of champions, engagement in outreach/training events, the frequency for which champions are acting on behalf of the issue. Brainstorm how your coalition may use the champion tracking data after it has been collected. In other words, who needs/wants to know about the recruitment or engagement of champions?
- Assign someone the responsibility to collect, enter, and analyze the data.
- Based on what your coalition has identified as important to track, create some type of documentation system, such as a word document or excel spreadsheet where tracking data can be entered. Here’s an example of a spreadsheet.

Please indicate champions with whom <your coalition> has engaged each month and who have taken actions (e.g., people engaged from the community who have advocated on behalf of the coalition). Example actions include: attending meetings, making phone calls, writing letters, speaking to a key stakeholders, providing comments on draft documents, etc.

Champion Name	Affiliation	Date initially approached	Participation in training/ outreach	Action taken on behalf of issue	Date action taken	Context	Comments

For More Information: This tool was adapted from Born Learning – an early childhood development initiative developed by the United Way of America and the United Way Success by 6. <http://www.bornlearning.org>

(3)Comparative Document Review

Background/Purpose: When government agencies undertake planning process, such as developing or revising citywide comprehensive plans, multiple documents tend to be produced. Coalitions attempting to influence a government planning processes may seek to influence the content of these documents by providing comments/feedback on multiple drafts before a final document is produced. The purpose of the comparative document review is to collect evidence to assess whether the coalition members' comments on preliminary drafts influenced the content of a final document.

Example: The **Oregon Public Health Institute** (OPHI) developed the Comparative Document Review to assess the whether the Healthy Portland Plan Workgroup's feedback on documents generated by the City of Portland Bureau of Planning and Sustainability for the Portland Comprehensive Plan made a difference in final document produced. The Work Group has used information generated from this method to demonstrate its influence in the process. Following is a brief summary produced by OPHI describing the methods and results.

More Information: Contact Noelle Dobson, of the Oregon Public Health Institute, at (503) 227-5502 X224 or Noelle@orphi.org

Integrating Health into the Portland Plan: Measuring and Describing our Impact

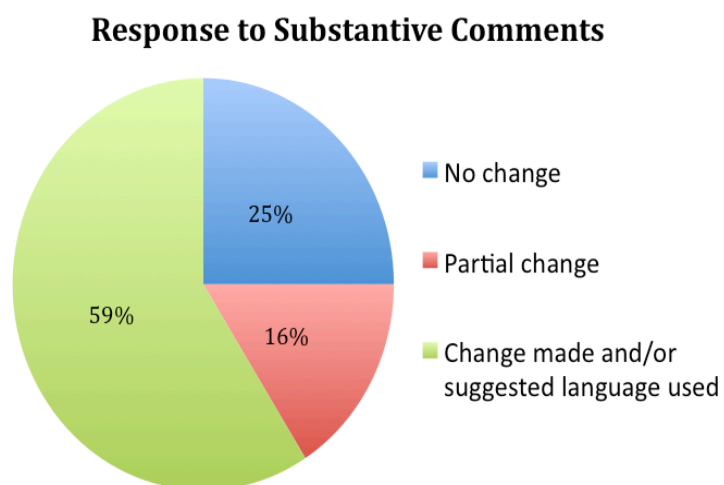
In October 2007, Oregon's Public Health Institute (OPHI) began convening the Healthy Portland Plan Working Group (HPPW), a diverse group of stakeholders committed to integrating public health and health equity concerns into the update of Portland's strategic and comprehensive plans. These plans will guide investment and development decisions in Portland for the next 25 years.

Members of the HPPW have been engaged in the Portland Plan process in several ways, including: reviewing and editing documents; participating in working groups; and attending public meetings and workshops. (See **timeline** for a list of other activities.)

In early 2009, BPS staff began drafting the Human Health and Safety Portland Plan Background Report. From the very beginning, the HPPW was integrally involved in developing and revising the language and content of the report. This document describes how the HPPW influenced the background report and attempts to quantify how the HPPW impacted the final product.

Influencing the Report

BPS staff presented an early outline of the report to the HPPW, which then assisted with the initial framing of the document and the table of contents. These early conversations between BPS staff and workgroup members were critically important in shifting the focus of the report away from individual behavior and disease outcomes to a broader focus on social determinants and the impact of the built environment. Throughout a four month period, BPS regularly attended HPPW meetings to get health input for the report. More than 10 HPPW members reviewed drafts and provided written and tracked-change edits to Noelle Dobson at OPHI. Noelle then compiled the comments as a complete set and sent them to BPS.



Document Review: Measuring our Impact

In an effort to measure the impact that the HPPW had on the final report, CHP staff conducted a document review that compared early drafts of the Background reports with the final report issued in February 2009. The reviewer compared versions line by line and noted whether suggested changes were: ignored, made in part, made in whole, or if suggested language was adopted verbatim. The reviewer also tried to determine if suggested edits were substantive (an edit likely only to be made by a public health practitioner) or more focused on formatting or word preference. (See below for an example of the review format used.)

Example of Document Review Format*

Section	Type of suggestion	Change	Response/changes made	Substantive
Health Equity	Deletion	x	Remove emphasis on smoking and physical activity choices when talking about health equity, focus on environmental determinants	Y
Introduction	Expand on "healthy communities"	o	From "healthy communities" to "communities that provide opportunity to be active, breathe clean air and access healthy goods and services such as healthy food, transit and social services"	Y

* In Change column: x = change made in whole; o = exact suggested language used.

This review process took approximately 15 hours and resulted in a list of over 60 substantive edits suggested by the HPPW.

Impact Summary

The report was divided into 10 sections listed below. The HPPW was especially successful in influencing the sections underlined below. Additionally, several members previously helped revise the Food Systems Background Report, which was the basis for the Food Access section.

- Executive Summary
- Introduction
- Health Outcomes
- Health Equity
- Clean Environments
- Safe Environments
- Food Access
- Active Living
- Access and Quality of Health Care
- Policy Recommendations

Examples of how workgroup comments impacted Background Reports:

- Strong built environment and social determinants frame with less emphasis on individual behavior.
- Highlight on disparities in health outcomes among communities of color and low-income Portlanders.
- Policy recommendations provided were used throughout the report.
- Strong evidence-base for connections between the social determinants of health and urban planning.
- Strong evidence-base for the impact of built environments on health outcomes.
- Discussion of economic costs of poor health outcomes.

Lessons Learned: Impacting the Report and Conducting Document Review

Revisions that provide specific example language were nearly always included in the final report, whereas general comments were not as frequently accepted. This indicates that this method of feedback should be integrated into future attempts to influence city documents. It was challenging to manage multiple sets of edits and versions of the document, and it is important to date each version of edits and draft reports. Also, track which workgroup members provide feedback. It is important for the person coordinating comments to provide adequate deadlines and clear timelines to workgroup members.

For more information about the HPPW or the document review, go to **Oregon Public Health Institute Healthy Portland Plan** at <http://www.orphi.org/healthy-community-planning/healthy-portland-plan>

(4) Convenience Store Check List

Background/purpose: Encouraging locally-owned convenience stores to sell more affordable and healthier food options, especially in low income communities, is becoming a common environmental change target. A convenience store check list can be used for two purposes: (1) conduct an assessment of the current store environment and food offerings to develop reasonable and feasible strategies to encourage owners to sell healthier foods; and/or (2) determine whether stores stock more affordable, healthier foods after strategies have been implemented.

Example: The **North Portland Healthy Eating Active Living Coalition** developed a convenience store check list and used it to assess the current environments and food sold in four Latino-owned neighborhood stores in the St. Johns and Portsmouth neighborhoods. Trained community residents administered the check list in Spanish and took pictures. Interviews were also conducted with the store owners. The coalition used the assessment data to plan their strategies for working with storeowners. The coalition may also use the checklist after the intervention period to determine whether improvements were made.

More information: Contact Ben Escalante of the Multnomah County Health Department at (503) 519-0811 or Benjamin.escalante@co.multnomah.or.us for copies of the checklist, how the Health Department trained community residents to use the checklist, or how the data were used.

(5) Constituent Survey

Background/purpose: Increasing public awareness or fostering public support for a policy or environmental change issue is classic advocacy strategy. A constituent survey can be used to: (1) gain an understanding about where constituents stand on the issue; or (2) assess whether a coalition’s education and outreach efforts are making a “dent” in community awareness or support.

Example 1: This example is adapted from the Early Childhood Funders’ Collaborative (BUILD) and was designed to gauge how well education events influenced participants on an issue. More information can be found at: <http://www.buildinitiative.org>.

Immediately after any education or outreach activity where coalition members make a presentation/pitch or hold a forum/meeting with a group of community members, distribute a half sheet paper with a couple of questions to assess how the message was received. Allow the survey to be anonymous, unless individuals would like to become involved. This survey could be repeated during multiple education/outreach activities and data could be summed over time.

Please indicate how much you agree or disagree with the following statements by putting a check mark in the appropriate box.

After listening to today’s discussion ...	AGREE	NEUTRAL	DISAGREE
I am more knowledgeable about the <issue>.			
I know about what I can do to support the <issue>.			
I am more motivated to support the <issue>.			
I plan to tell others about the <issue>.			

I am still concerned about the following: _____

YES! I would like to learn more or help out. Name: _____

Telephone: _____ E-mail: _____

Example 2: Kids @ Heart, a coalition working to prevent childhood obesity in Central Oregon, desired to encourage a local school district to adopt joint-use agreements with the community to use school facilities so that recreation options would be more available for children. The coalition administered two surveys to different constituents about their support for the desired policy. First, as part of an annual routine survey to middle school students, they added questions about students’ intended use of facilities for after school use. The coalition shared these results with the Superintendent. Second, as part of a strategic planning process, the Coalition surveyed over 100 partners about their support for various policies, including joint use agreements. Survey results indicated partners highly prioritized joint use agreements. These data were used to prioritize coalition actions for the next five years. For more information (and examples of surveys), contact Kate Wells at St. Charles Health System – (541) 706-4789 or kmwells@stcharleshealthcare.org.

Constituent Survey (continued)

Example 3: The **North Central Oregon Physical Activity and Nutrition Coalition** desired to encourage The Dalles Little League to adopt healthy snack guidelines for games. As part of its strategy, the coalition conducted a brief survey of Little League parents during an orientation to gauge parents' concerns about childhood obesity, their beliefs about healthiness of snacks currently distributed at games, and support for little league healthy snack guideline. The data indicated parents were concerned about obesity, believed that unhealthy snacks were being distributed, and supported a healthy guideline policy. The coalition summarized the results and shared with the Little League Board Members. Following is an example of parent survey. For more information, contact Allyson Smith of the North Central Public Health District at (541) 506-2625 or allysons@co.wasco.or.us.

Example 4: The **Benton County Health Department** and Corvallis Parks & Recreation Department teamed together on a Robert Wood Johnson Foundation grant supported initiative entitled, *Creciendo en Salud*. The aim is to promote active living and improve access to affordable, nutritious foods in South Corvallis, especially for low-income family and children. As part of the initiative, they surveyed community residents, held community forums, and conducted interviews with key informants to better understand the issues facing South Corvallis residents when accessing healthy food and safe places for recreation. Following is a summary of key findings from the surveys, community forums, and interviews that will be used to communicate key barriers faced by South Corvallis residents for healthy eating and active living. For more information, contact Patty Parsons of the Benton County Health Department at (541) 766-6659 or Patricia.D.Parsons@co.benton.or.us.



Parent Views on Little League Game Snacks

Thank you for your interest in the healthy game snacks & beverages initiative.

We hope to learn about parents' views and concerns about promoting healthy snacks and beverages at Little League games, and thus be able to communicate the level of parent interest and support of healthy snack policy to Little League board members.

Your responses to this questionnaire are completely anonymous, and will not be shared with other team members or the Little League board members or coaches. Because of this, we urge you not to write your name on this questionnaire.

1. For how many years have you (or family members) been involved with Little League? _____
(number of years.)

2. How concerned are you about the health qualities of the snacks provided by parents at little league games?

- Very concerned
- Somewhat concerned
- A little concerned
- Not concerned at all
- Don't know

3. During the last Little League season (2009), how would you rate the overall healthiness of snacks and beverages offered at games by parents?

- Very healthy
- Somewhat healthy
- A little healthy
- Not healthy at all
- Don't know

4. Knowing that obesity is associated with increased health problems and lower life expectancy, how worried are you about the idea of an “obesity epidemic” and its effects on your child’s future health?

- Very concerned
- Somewhat concerned
- A little concerned
- Not concerned at all
- Don’t know

5. How supportive are you of encouraging parents to bring healthy snacks and beverages to Little League games?

- Very supportive
- Somewhat supportive
- Neutral
- Not supportive at all
- Don’t know

6. If Little League board of directors adopted a policy for promoting healthy snacks and beverages at games, how supportive would you be of that policy?

- Very supportive
- Somewhat supportive
- Neutral
- Not supportive at all
- Don’t know

7. I have the following comments or concerns about formation of new policy:

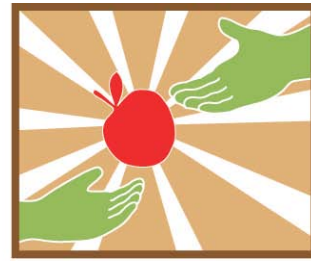
{If you have an interest in learning more or in helping promotes healthier choices for our young athletes, consider putting your name and contact information (phone, and/or email) on the clipboard. Mention what your interest is, and you will be contacted.}

Thank you for taking time to give us your feedback!

Allyson Smith RN
North Central Public Health District
Physical Activity and Nutrition Coalition

Creciendo en Salud

helping communities create healthier neighborhoods



South Corvallis Residents Speak

Creciendo en Salud is a grant funded partnership, sponsored by the Robert Wood Johnson Foundation, helping residents influence the planning of their communities and reduce disparities between neighborhoods.

During the first 6 months of the project we conducted community forums, a resident survey, and key informant interviews to help us better understand the issues facing South Corvallis resident's use of Parks & Recreation.

Strengthening South Corvallis

South Corvallis has many attributes that promote active living. Willamette Park and Crystal Lake Sports Fields offer 5 miles of multi-use trails and 287 acres for recreational activity. Furthermore, Avery Park has several shelters, restrooms, a community garden and a variety of play equipment. Lilly, Rivergreen and Tunion provide open spaces for children to play.

Families with young children reported that the narrow sidewalks and fast moving traffic along highway 99 limits safe access to parks. Although new crosswalks have been installed, many families report that drivers do not always respect the cross walk, and that safety is still a great concern.

Four out of five families have not participated in an organized recreational program during the past 12 months. Barriers to participation include parents' work schedule, the perception that activities are not age appropriate, lack of activities located within their neighborhoods, language barriers, and fees.

Suggestions from the Residents

- Many families would like to have a restroom at their park, along with a picnic area. This is especially important for mothers with small children.
- The play equipment at Tunion Park is not age appropriate for small children ages 2-5.
- Families identified the need to have more activities located within south Corvallis.
- Bilingual/bicultural (Spanish) instructors.
- Programs focused on the needs of low income and Latino families.

87% of the families surveyed reported that the parks near their home are clean

75% stated that the parks have good play equipment

Juntos podemos! Together we can!

Contact Us: Megan Patton-Lopez: megan.patton-lopez@co.benton.or.us, 541-766-6364

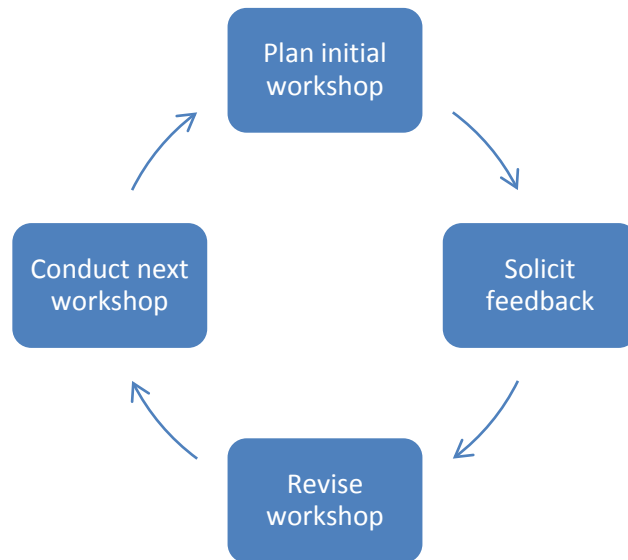


(6) Presentation Refinement Tool

Background/Purpose: Conducting an education or persuasion workshop multiple times with various stakeholders is a common strategy for influencing policy change. The Presentation Refinement Tool helps to improve the process of holding multiple presentations.

Example: The Cowlitz Exploratory Committee for Metropolitan Park District (MPD) held a series of four workshops during summer 2010 to educate board of county commissioners and city councils about forming a MPD. The committee used a classic process improvement cycle by:

1. Planning the initial workshop
2. Soliciting feedback during and after the workshop from committee members; and
3. Revising workshop materials/talking points for the next workshop



Two methods were used to solicit feedback to improve successive workshops:

1. During the presentation, the facilitator noted comments/suggestions made during a presentation.
2. After the presentation, the facilitator sent an e-mail to committee members requesting their observations about the presentation and how to improve the next one.

The tool helped evaluate and identify areas for the presentation to improve. The committee knew in advance to gather informative feedback from the presenters and the community officials being presented to. A committee member documented questions asked and comments to revise the presentation and make clearer for the next workshop.

For More Information: Contact Paul Youmans at Pathways 2020 at (360) 423-8704 or youmans@cowlitzedc.com

PROGRESS BULLETIN GUIDANCE

What is a progress bulletin?

Achieving a desired P/E change may take years. A bulletin periodically communicates progress on milestones toward desired policy or environmental change to key stakeholders.

Why draft accomplishment documents?

1. Provides an opportunity for coalition members to “take stock,” celebrate, reflect, and make mid-course revisions.
2. Informs external stakeholders (e.g., funders, policy makers) about the coalition’s efforts toward the desired P/E change.
3. Encourages targets of change (i.e., those listed in the strategy map) to accelerate their changes based on progress. In other words, the progress brief may be used as an advocacy tool.

What stakeholders may benefit from a progress bulletin?

Type of stakeholder	Potential benefits
Coalition members	Provides an opportunity for coalition members to reflect upon and celebrate the milestones reached thus far and review/revise important next steps. Can be used at a regular coalition meeting to share progress and obtain input on next steps.
Fiscal agent board members or staff	Informs less involved individuals who “support” the coalition by concisely sharing what you’re doing, why it’s important, and accomplishments made thus far. Can be used as a stand alone for a brief update or supplement a more detailed presentation during a board or staff meeting.
Funders	Communicates to current or potential funders about the milestones achieved toward a desired policy or environmental change. Can be used as an appendix in a grant proposal or progress report.
Media reporters	Highlights key issues and accomplishments when a brief background is needed to write a story. Can be attached to a press release or given to a reporter during an interview.
Community members	Communicates key aspects of the coalition, the issue, and progress toward desired changes when recruiting or educating interested community members. Can be distributed during a community meeting or one-on-one meetings.

What are key elements of progress bulletin?

Suggested elements	Description
Brief & concise	Keep it brief and to the point with a maximum of two pages. One or two pages make it necessary to share only the most important details and make it easier for stakeholders to digest.
Graphically pleasing	To keep stakeholder attention, make the document interesting to look at through bullets, boxes, pictures, logos, tables, and color.
Title	Provide a one sentence/statement that clearly identifies the desired policy or environmental change and achievements made.
Coalition description	If needed, provide a paragraph description of the coalition mission, key partners, and highlight objectives. Insert a logo or graphic representing the coalition or fiscal agent.
Rationale	Provide a short, compelling rationale for why the desired policy or environmental change is important to your community. May be helpful to describe the problem with a few statistics. Consider inserting a picture or graphic related the change, if possible.
Collection efforts	Identify the key strategies the coalition is using to influence the P/E change.
Milestones accomplished	Construct a timeline that highlights the key milestones that has been made toward the desired change by date. When possible, include quotes or pictures demonstrating the work.
Future milestones	List the next steps or milestones that your coalition plans to move forward on to achieve the desired policy or environmental change.
Contact	If needed, provide a name and contact name for more information.

What are examples of progress bulletins?

The following pages include examples of progress bulletins created by coalitions.

Progress toward Establishing a Metropolitan Park District (MPD) in Cowlitz County

Why Establish a Metropolitan Park District (MPD) in Cowlitz County?

In 2009, officials from Cowlitz County and Kelso, Longview, Woodland, and Castle Rock cities met at a Government Summit to problem solve the reduced revenue available to sustain services. Parks identified as a high priority. A Summit Parks Committee comprised of appointed citizens & government representatives began meeting to investigate how to best fund and sustain parks, trails, and recreation programs. Consideration of three options: a Park & Recreation District, a Park & Recreation Service Area, or a Metropolitan Parks District (MPD). The Summit Parks Committee selected the MDP option because it provided a secure tax base and the most local input and design. The MPD is expected to:

- ✓ Dedicate & sustain funds to maintain, improve, and keep parks and recreation programs open
- ✓ Maintain and develop new county and city trails
- ✓ Connect county and city trails
- ✓ Support long-range facility planning
- ✓ Provide alternative transportation options
- ✓ Offer accessible opportunities for residents to engage in physical activity and reduce chronic disease



What Milestones have been Accomplished to Establish a MPD in Cowlitz County?

DATE	MILESTONES
April 2009	<ul style="list-style-type: none"> ✓ Formed Summit Parks Committee with COTM members Ron Junker (County Parks and Facilities Director) and Dave Vorse (Castle Roc Public Works Director and Pathways 2020 board member) given key roles with the committee ✓ Paul Youmans appointed to represent Cowlitz on the Move/Pathways 2020
Apr 09 – May 10	<ul style="list-style-type: none"> ✓ Researched options, legal requirements, and tax/budget considerations
May 2010	<ul style="list-style-type: none"> ✓ Recommended forming a hybrid model Metropolitan Parks District (MPD) entitled, “Five Rivers Park District” ✓ Kalama opts out of discussions
May – June 2010	<ul style="list-style-type: none"> ✓ Held 5 workshops to educate members about MPD: (Castle Rock, Kelso, Longview, Woodland, and Cowlitz County)
June 2010	<ul style="list-style-type: none"> ✓ Drafted MPD resolution with assistance from Cowlitz County Prosecutor
June – July 2010	<ul style="list-style-type: none"> ✓ Castle Rock Park & Recreation Board voted to endorse MPD strategy ✓ Castle Rock City Council voted to endorse MPD strategy ✓ Cowlitz County Parks Board endorses MPD ✓ Longview and Kelso decline to join countywide MPD ✓ Woodland makes no decision ✓ Longview City Council proposed a Longview/Cowlitz County MPD ✓ Cowlitz Board of County Commissioners decide to keep researching the MPD structure

What are the Future Milestones for Establishing a MPD in Cowlitz County?

- ✓ Final Report to Executive Summit
- ✓ Restructure Committee
- ✓ Reach agreement on MPD design (new smaller size)
- ✓ Complete SEPA review
- ✓ Obtain approval from the Boundary Review Board
- ✓ Decide whether to take MPD resolution to voters
- ✓ (If so) Form Citizens Campaign Committee to advocate for MPD resolution
- ✓ Place MPD resolution on Primary of General Election Day ballot
- ✓ Voters vote to approve MDP resolution



Who We Are and What We Do

The purpose of Kids@Heart is to advance the prevention of disease as a regional concern and support communities to insure all children have opportunities to be active, eat healthy and play. The partnership includes local schools, doctors, businesses and health improvement groups to make healthy choice the easy choice for children, youth and families.

Joint Use Agreements Help Our Children and Communities Be Healthy

Childhood and adolescent obesity is a national public health crisis. Nationally one-third of all children have a Body Mass Index (BMI) above the 85th percentile. Young people who are obese are 80 percent more likely to be obese as adults. This increases their risk of developing diabetes, heart disease, cancer and other serious health conditions. Jefferson County has very high obesity rates among youth. Close to half of preschool and school aged children are either overweight (above 85th percentile for height and weight) or obese (greater than 95th percentile). Poverty is a risk factor for obesity as is geographic location (rural). People of Hispanic/Latino, Native American race and ethnicity are disproportionately affected as well. Much of this has to do with our environment and the level of access we have to healthy foods and recreational opportunities.

How can joint use agreements help our children be healthy in Jefferson County?

Jefferson County is the only community in Central Oregon that does not have a Parks and Recreation District. Together, the city, schools and community can do more to increase opportunities for children, youth and families to lead healthy active lifestyles. Joint use policies are strategies to do just that. It refers to two or more entities — usually a school and a city or private organization — sharing indoor and outdoor places like gymnasiums, athletic fields and playgrounds. The concept is simple: share and coordinate resources to keep costs down and communities healthy.

Kids@Heart is working to establish joint-use in Jefferson County to help the schools become stronger community focal-points, and to bring our County closer to the longer-term goal of developing a coordinated recreation sector to increase afterschool and summer programming.

DATE	MILESTONES
Fall 2009	<ul style="list-style-type: none"> ✓ Kids @ Heart and HACO agreed to focus on 509 J District joint use agreement as part of the Northwest community changes advocacy evaluation project ✓ Conducted research on joint use agreements & obesity problem in Jefferson County
Fall 2009- Winter 2010	<ul style="list-style-type: none"> ✓ Submitted a proposal to the Oregon Community Foundation for a community school with healthy eating and active living components in Jefferson County ✓ Built relationships with key Jefferson County officials including the 509 J school district superintendent and Madras Director of Community Development ✓ ACHIEVE included joint-use policy target in action plan.
Spring 2010	<ul style="list-style-type: none"> ✓ Conducted a survey of Jefferson County Middle School students’ weight/BMI, risk factors for obesity, and preferences for using after school facilities and programs; students indicated strong preferences after school activities
Summer 2010	<ul style="list-style-type: none"> ✓ Convened West Side Task Force with representatives from Jefferson County Commission on Children and Families, CHIP, OCDC, and ACHIEVE to advocate for joint-use as a strategy to increase opportunities for youth recreation ✓ As part of Kids @ Heart strategic planning process, administered a survey to over 100 community partners to prioritize policies; joint use agreements highly ranked ✓ Sample joint-use agreements illustrating the range of options to consider presented to Task Force

Future Milestones to Achieve Joint-Use Agreement Policy

1. Kids@Heart representatives to meet with 509J Superintendent and Madras Community Development Director to discuss the benefits of joint-use
2. Madras City Development Director and Superintendent champion joint-use to the school board
3. School board approves joint use agreement for 509J School District, with special provision for former Westside Elementary Site.

The Dalles Little League Adopts Policies that Promote Healthy Snacks and Beverages at Games

In spring 2010, The Dalles Little League adopted a policy that encourages parents to provide healthy snacks and beverages when distributing to the entire team at sporting events. The North Central Oregon Physical Activity and Nutrition Coalition worked with The Dalles Little League Board of Directors on the policy.

Why is it Important to Offer Healthy Snacks and Beverages at Youth Sporting Events?

13% of Wasco County 11th graders are overweight
34% of Oregonians are obese (Body mass index \geq 30% of ideal weight). Obesity leads to greater health risks.

Excess body weight is the result of an imbalance of calorie intake vs. calories spent by the body.

Some factors that lead to obesity are:

- Inactivity
- Low intake of fruits and vegetables
- High intake of sweetened beverages
- Foods low in nutrients, high in fats and sweeteners
- Skipping breakfast
- Lack of participation in school PE classes
- Increase in car travel vs. biking and walking

Healthy Snack Policy helps in these ways:

- Increases awareness of good nutrition
- Supports parents who desire healthy choices
- Gives consistent message with other policies



Quotes from parents of The Dalles Little League Athletes

"I cringe when I see some of the snacks that show up at sports games."

"(The policy) is a Great idea! We need to change how America eats!"

How did the North Central Oregon Physical Activity and Nutrition Coalition Help Promote the Policy?

From fall 2009 through spring 2010, the North Central Public Health District took the lead in working with The Dalles Little League Board to promote the healthy snack and beverage policy through the following efforts.

- Built relationships with Little League board members by attending their meetings
- Educated Little League parents about the obesity problem at the spring orientation meeting
- Conducted a survey of over 20 Little League parents about their views and concerns about childhood obesity and a proposed healthy snack/beverage policy
- Distributed summary of parents' views and concerns to Little League board members
- With input from registered dietitians, drafted and distributed a proposed policy and list of healthy snack ideas to Little League board members
- Translated materials into Spanish
- Posted both English and Spanish versions on the website



For more information, contact: **Allyson Smith RN, North Central Public Health District, (541) 506-2625, allysons@co.wasco.or.us, www.wshd.org**

Progress toward a Healthy Latino Corner Store Network in North Portland

Why Establish a Healthy Corner Store Network in North Portland?

In 2006, the N. Portland HEAL (Healthy Eating Active Living) Coalition came together to promote physical activity and healthy eating among children and families living near and attending Clarendon Elementary (now César Chávez K-8 School) in N. Portland's Portsmouth neighborhood. Participatory research with neighborhood parents identified improved access to healthy, affordable food as a high priority. In 2009, HEAL partners from the Multnomah County Health Department and Portland State University launched the Healthy Corner Store initiative to work with existing Latino-owned stores to improve food access in this community. Parents and store owners began meeting in early 2010. Parents conducted a detailed store observation in order to identify ways to improve healthy options and address store owners' needs. The Healthy Latino Corner Store Network is expected to:

- ✓ Help store owners find ways to improve their store environments, and to make healthier options more plentiful and more easily identified.
- ✓ To assist store owners in securing funding for needed infrastructure, such as point of sale technology, EBT machines, or store shelving.
- ✓ To identify cultural foods that would draw parents to local stores.



What Milestones Have Been Accomplished to Establish a Healthy Corner Store Network?

DATE	MILESTONES
Spring 2008	✓ North Portland PhotoVoice Project identifies food access as one of three priority action areas for neighborhood parents.
Fall 2009	✓ PSU interview study with parents finds that neighborhood supermarkets do not meet the needs of Latino shoppers, and that most families travel long distances to shop.
December 2009	✓ HEAL partners decide to approach neighborhood store owners to improve shopping options within the Portsmouth and St. Johns neighborhoods.
March 2010	✓ Latino parent leaders and store owners meet at César Chávez School to discuss the creation of a Healthy Latino Corner Store Network.
April 2010	✓ Four store owners agree to participate in the Healthy Corner Store project.
July 2010	✓ Eight parent volunteers agree to participate in the Healthy Corner Store project.
July-August 2010	✓ Parents conduct a structured observation of four stores.

What are the Future Milestones for Establishing a Healthy Corner Store Network?

- ✓ Conduct a structured interview with store owners to find out their business needs.
- ✓ Meet with parents and store owners to discuss finding of observations and interviews and identify barriers and opportunities.
- ✓ Assist store owners in securing equipment, funding, purchasing and business advising as needed.
- ✓ Create marketing materials to identify participating members of the Healthy Corner Store Network and inform neighborhood families about the improved options.
- ✓ Develop criteria for selecting potential new network members and becoming recipients of incentives.

For more information, contact Ben Escalante, Community Health Worker, Community Wellness and Prevention Program, MCHD, 503-988-3663 x21050, benjamin.escalante@multco.us

IMPACT OF HEALTHY PORTLAND PLAN WORKGROUP ON PORTLAND PLAN

Healthy Portland Plan Workgroup (HPPW): an informal network of community health stakeholders working to integrate health goals, objectives, and performance targets into the update to Portland's Comprehensive Plan. Workgroup members connect via email and in-person workgroup meetings to stay engaged in planning activities, provide expertise to Portland's Bureau of Planning & Sustainability (BPS), and advocate for Portland Plan (PP) policies that will benefit public health.

Timeline highlights

September 2007: CHP:OPHI establishes HPPW. The workgroup's first activity was to develop and send an 8-page letter to the Portland Bureau of Planning & Sustainability that a) introduced community health stakeholders as interested in being included in Comprehensive Plan update discussions; b) highlighted the body of research evidence that shows the impact of the built environment and urban planning on health; c) described expertise that community health stakeholders could bring to the planning process.



May 2008 – BPS releases eight Portland Plan Framing Ideas, including Health and Human Safety.

January 2009 – June 2009: HPPW spends several months assisting BPS staff to develop Health and Food Systems background reports. Workgroup members provide local existing conditions data and national best practice findings and review multiple drafts of background reports. HPPW assists BPS in framing health as a result of social conditions and built environments, rather than a result of solely individual behavior choices and disease outcomes. A majority of edits provided by HPPW were included in the final background reports.

May 2009: More than 45 people are on the HPPW email list, and approximately 20 people attend meetings in person.

June 2009: BPS staff begins regularly attending workgroup meetings and participates in developing and presenting the agenda. HPPW is identified by Portland Plan project management as a key stakeholder group to include as an ongoing partner.

October 2009: Human Health, Food, & Safety is identified as one of nine key Action Areas for further Portland Plan development.

November 2009: BPS staff present to HPPW in advance of Round One Public Workshops. HPPW helps adapt workshop survey questions and outreach materials.

January 2010: Workgroup chair Noelle Dobson asked to co-chair Human Health, Food & Safety technical advisory group (TAG). TAG members meet weekly and are responsible for developing draft goals, objectives, activities, and measures for each Human Health, Food & Safety focus area, and develop materials to share progress and solicit feedback from multiple stakeholders.

October 2008, October 2009, February 2010: CHP: OPHI, BPS and other partners receive funding from Kaiser Permanente Community Fund, Northwest Health Foundation, and American Reinvestment and Recovery initiative to commit staff time to integrating health into the Portland Plan and other Portland urban planning frameworks.

For more information about the Healthy Portland Plan Workgroup, contact Noelle Dobson at Noelle@communityhealthpartnership.org. For more information on the Portland Plan, go to <http://www.pdxplan.com>.

Human Health, Food and Public Safety FOR DISCUSSION

Why is this important?
Many Portlanders are not healthy and our rates of chronic disease are rising. Human health is a community issue, not just a personal one, because healthier people have greater opportunities to learn, play, think and innovate. Health is also a community issue because the place we live in can affect our health.

Direction 1: Make healthy food the easy choice

Objectives for discussion {
A. Increase access to healthy and affordable food
B. Decrease dependence on food assistance
C. Increase home-grown and locally-grown food
D. Expand access to food education

Direction 2: Increase participation in physical recreation and community activities

Objectives for discussion {
A. Increase walkable access to parks and nature
B. Make sure all parts of the city have access to recreational activities
C. Increase opportunities for active and healthy lifestyles
D. Expand physical activity opportunities for young people

Direction 3: Protect Portlanders from exposure to pollutants

Objectives for discussion {
A. Improve air quality
B. Provide high quality and reliable water and sewer services
C. Reduce exposure to household toxics
D. Improve river health
E. Reduce exposure to noise pollution

Direction 4: Promote safety and sense of security

Objectives for discussion {
A. Improve the sense of safety in all neighborhoods
B. Improve public and private emergency preparedness
C. Provide high quality and reliable safety services

Direction 5: Make public decisions benefit public health

Objectives for discussion {
A. Create and track public health goals and measures
B. Consider public health impacts in investment decisions
C. Improve health equity

visionPDX: We are a community whose members care about and are committed to our individual and collective well-being

2 _____ THE PORTLAND PLAN WORKSHOPS: PHASE II _____

Healthy Portland Plan Workgroup Activity Timeline

