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Developing and Managing a Partnership

Partnership Development: Aligning Visions

Healthy Foods, Healthy Moves: InForm Chicago required a strong partnership between two organizations with different cultures but common goals. Our two organizations were not new to each other having collaborated for many years before the project started. In fact, CISC's Executive Director helped start CLOCC's School Systems Working Group and serves on CLOCC's Executive Committee. Even with this shared history, we had to align our approaches to this project. Taking the time to work on alignment was invaluable and the partnership between CISC and CLOCC has enabled the project to have a broader reach.

Project partners learned that establishing clear roles for their respective organizations and staff was critical to the successful management and implementation of the project. Each partner organization assumed distinct responsibilities including: fiscal agency for shared funding streams; coordination of project meetings and committees; implementation and evaluation of each program component; and management and coordination of third party consultants.

We also learned that it is helpful to discuss organizational culture – who makes final decisions, how often internal teams meet and processes for cultivating and communicating with funders.

HOW TO REPLICATE, STEP BY STEP

- 1. Learn about your partner.** Allocate time to make sure that all staff is familiar with each organization, their key programs, and their role in the project.
- 2. Establish clear roles.** Determine specific roles that spell out project management and program implementation responsibilities that each partner organization and their staff will take on.
- 3. Develop systems to keep track of the partnership management activities.** Determine what types of shared reports will be necessary to document and track project activities and progress.
- 4. Plan communication with funders.** Partners should discuss reporting to funders and how to respond when receiving input from funders and other collaborators. A unified approach is important when partners have different organizational protocols.

Tip: Designate one person to be the main contact and to manage reporting.

Tip: Discuss individual relationships you have with each funder in terms of priority, communication and future plans.

Partnership Development: Memorandum of Understanding (MoU)

One of the most important documents that we created in the initial stages of this project was a Memorandum of Understanding, also known as the MoU. The purpose of this document was to clarify the logistical and legal responsibilities of each partner.

CLOCC and CISC developed a MoU that addressed the following areas:

PROJECT OVERVIEW

Summary of Project – Defined the scope of work and duties.

Timeline – Included information about the start and end dates for the work of the project and intermediate deliverables.

Decision Makers – Indicated who is authorized to represent the organizations. These representatives were also the staff persons that signed the MoU.

FINANCIAL INFORMATION

Estimated cost and share of funding – Detailed budget information and how and when funds would be distributed.

Fiscal responsibility – Clarified expectations and specified liability for financial management by each party.

Disbursement – Described how the fiscal agent would time the distribution of grant funds.

Audit – Clarified that all parties were responsible for maintaining records for audits.

LEGAL INFORMATION

Relationship of the parties – Clarified the legal relationship between the two organizations.

Indemnification – Showed how each organization would protect the other from any failings that could impact the project.

Intellectual property and publications – Defined who owns the work products that come out of the partnership.

Confidentiality – Clarification of what each partner may share with outside parties and under what circumstances.

Limit of Liability – Defined the limitations of any liability one partner can claim against the other.

Termination – Showed how the relationship between partners would be ended, if necessary.

HOW TO REPLICATE, STEP BY STEP

- 1. Develop a Memorandum of Understanding.** This memo clarifies the responsibilities of each partner and liability for project activities. This document should also clearly outline how money flows and who is accountable.
- 2. Create a plan to deal with shared costs and responsibilities.** Be extremely specific about all financial responsibilities.

***Tip:** Be sure to consider situations in which new work overlaps with existing work or costs are shared between organizations.*

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Project Management: Management and Structure

Project partners established a steering committee which met monthly to provide ongoing oversight for the project and ensure communication.

The steering committee was made up of eight people including the executive directors of each organization and the managers and program staff responsible for implementing major elements of the project. This included the director of development at the lead agency who was responsible for communicating with and reporting to the funder.

The two partner organizations alternated preparing the monthly agenda, gathering and sending out the meeting materials, hosting the meetings, and taking and distributing meeting notes.

Quarterly, the steering committee extended the meeting time from one-and-a-half to three hours so there was time to have expanded discussion on timely items. These meetings, which included a meal, served the dual purpose of project guidance and decision making and ongoing relationship building among the partners.

The steering committee established three sub-committees to address major project – the evaluation committee, the conference committee and the communications committee. Each of these committees also met on a monthly basis and shared updates at the steering committee meetings. Partner organizations divided leadership and administrative responsibilities for these committees as well.

HOW TO REPLICATE, STEP BY STEP

- 1. Establish a steering committee.** Select members that represent each lead project partner to meet regularly and provide oversight for the project.

Tip: Even after learning about a partner in the early stages of the project, partners should still dedicate time to partnership development. Occasional expanded steering committee meetings can provide opportunities to problem-solve, make decisions, and build interpersonal relationships.

- 2. Prepare an agenda for meetings.** Designate responsibility for developing the agenda, facilitating the meeting, and preparing minutes.

Tip: Send all meeting materials to the full committee at least one week ahead of time. Meeting materials may include minutes from previous meetings, notes from each of the committees, and program updates that demonstrate activity related to the project.

- 3. Create subcommittees that reflect activities impacting both partner organizations.** Each subcommittee should have representatives from each organization and meet on a regular basis.

Tip: When identifying committees, beware of assigning individuals to multiple committees. This can diminish their ability to focus on assigned tasks and minimize the distinction between committees.

Project Management: Communications

Consistent language and public outreach will take dedicated effort and will benefit from having a committee represented by all lead project partners. In this section, we target two key communications goals: 1) building a foundation for communications by creating a project name, project logo, and talking points and 2) getting the word out about the project to the public.

BUILDING A FOUNDATION

When creating materials, we focused on meeting the communications needs of each partner and making sure that what we created was practical and easy to use.

CREATE A PROJECT NAME

For the project name, we brainstormed key words and ideas, a useful process that helped us understand the preferences of each partner.

HOW TO REPLICATE, STEP-BY-STEP

- 1. Brainstorm words and phrases.** Find out what words work for each partner. There may be some terms that partners would like to avoid using.
- 2. Decide how name will be used.** Establish how the project name will be used in publications and other formats – determine whether you will use any acronyms or shortened versions.
Tip: Make sure the name will be meaningful to a variety of stakeholders.
- 3. Confirm that name is original.** Conduct research on the Internet to ensure that project names and logos you are considering are not used elsewhere. Research can help you determine whether your project's name is likely to be confused with another project. Plus: Check to see if a matching URL is available for purchase on a domain name registration service website like Network Solutions (www.networksolutions.com).
- 4. Gather input from staff.** Ensure that the name works in regular usage for all staff. Other project staff may provide fresh insights and a distinctive perspective, as they may not have been involved in the naming process.

CREATE A PROJECT LOGO

For the logo, we researched other nutrition and physical activity initiatives – we did not want ours to be similar to the logo of other projects. We also discussed how the logo would be used and coordinated colors with both partners' existing materials.

HOW TO REPLICATE, STEP-BY-STEP

- 1. Budget for your logo.** Include money in the budget for designers to create the logo. Other alternatives include contacting a local university that might provide leads to students who can do the work at a lower rate, or engaging design or marketing firms who might contribute their services (see section 5 on mobilizing resources).

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2. **Create a style guide.** A style guide lists the rules for keeping the logo consistent. This list should include fonts, sizes, color specification, and acceptable alternative images.

DEVELOP TALKING POINTS

An essential element of communications for us was that partners spoke a common language when talking about *Healthy Foods, Healthy Moves: InForm Chicago*. We created conversational talking points that describe each partner and their project responsibilities. Talking points are internal documents that encourage everyone associated with the project, including non-project staff at partner organizations, to be on the same page. Talking points, by encouraging common language, helped to ensure that stakeholders outside of the project partnership heard consistent descriptions of the project and had an accurate understanding.

HOW TO REPLICATE, STEP-BY-STEP

1. **Draft talking points.** Create talking points that include goals of the program, primary tactics, and descriptions of each partner's project responsibilities. Include agreed-upon wording for funder recognition.

Tip: Make sure that talking points are consistent with other project materials and descriptions.

2. **Train staff.** Train staff at each partner organization in the talking points before formal announcement of the project.
3. **Incorporate talking points into staff training materials.** Talking points should be incorporated into materials that orient new partner organization staff.

GETTING THE WORD OUT

The key to our public relations was being strategic in how we communicated about the project and accessing a variety of expert resources to help us develop our plan. These experts included partner organization staff with communications experience and board members with public relations expertise.

The *Healthy Foods, Healthy Moves: InForm Chicago* project utilized a previously established pro bono relationship with Edelman, a full service public relations firm (see section 5 on mobilizing local resources). Through this relationship, we:

1. Identified spokespeople for each organization and project participants who could speak about the project;
2. Created a communications plan that outlined goals, a timeline, and story ideas; and
3. Developed collateral materials, including press releases and story ideas for local media.

HOW TO REPLICATE, STEP-BY-STEP

Whether or not you are working with a PR/communications firm, you will want to follow these steps.

1. **Create a communications plan.** That plan can include overall goals for communications outreach, a timeline for key activities, collateral materials to provide background on the project and message, a general press release, and story ideas to pitch to media outlets.
2. **Choose spokespeople.** Pick spokespeople who can discuss the origins of the project, share experiences at project activities, and share success stories and impact. Keep in mind that there may be multiple opportunities to communicate key messages so you will want a range of people who can deliver them in a powerful way.

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Tip: In addition to selecting key spokespeople at each lead partner agency, also identify staff and participants from collaborating community institutions and project beneficiaries. They may include staff at schools and community organizations hosting the Go Team, or Go Team members themselves.

If your project does plan to work with a Public Relations or Communications firm, you will want to follow these steps.

- 1. Select a firm with experience in this field.** A growing number of public relations firms have experience working with the nonprofit sector and many work on health-related issues and community outreach projects.
- 2. Provide key information to the firm.** Make sure the firm sees all key documents, including talking points and promotional and educational materials.

Tip: Keep the firm informed of each partner's media activities even when they are beyond the scope of the project. Since the project partners may have other projects with recent or active communications efforts you want to avoid confusing external audiences and media contacts.

WEBSITE DEVELOPMENT

We also decided that development of an interactive website was a communications priority; the website, www.healthyfoodshealthymoves.org, is an important tool for both message dissemination and project replication. The website raised awareness about the project to the public and communicated key information to funders and partners.

Key steps in this process included purchasing URL's with desired website names, selecting a design concept, and adding content as needed. While developing our website, we worked closely with CLOCC's corporate partner and web designer, Goble & Associates, an independent healthcare communications agency.

HOW TO REPLICATE, STEP-BY-STEP

- 1. Establish a website budget.** The project should include a line item in its budget for the website which could include costs associated with staff time for creation and maintenance, hired consultants and URL purchase.
- 2. Designate staff for website development.** Key activities will include identifying and defining goals, purpose and the audiences for website and creating a timeline. These designated staff persons will also be responsible for working with any external designer to create a design template and color palette.

Tip: Think broadly about the potential of your website, which can be used to share information about events, announce activities of any partnering organizations, and collect information.

- 3. Organize your site map.** Develop a site map that outlines the various elements.

Tip: When incorporating logos or other communications pieces that will be in digital/electronic format, make sure they are protected from unintended changes.

- 4. Purchase websites.** If creating a separate website, purchase the URL as soon as possible. Also consider purchasing .org, .com and .net sites – and having them redirect to main site. This can be done through a domain name registration service like Network Solutions (www.networksolutions.com).
- 5. Maintain the website.** Assign and train someone internal to the project to maintain and update the site. Website needs to be updated on a regular basis.

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Project Management: Project Evaluation Integration

Evaluation is a critical component of *Healthy Foods, Healthy Moves: InForm Chicago*. We wanted our evaluation plan to answer three broad questions about our work:

- What is the initiative’s impact on children, organizations, and institutions in Chicago?;
- How can we strengthen program elements throughout implementation?; and
- What are the most important elements of the program for replication in other communities?

CISC and CLOCC each came to this partnership with prior experience in evaluation and with unique philosophies and approaches to evaluating their work. To help us align our approaches to the project evaluation, we created a matrix to track the main evaluation questions. The matrix outlined the changes we believed would occur across multiple audiences and environments as a result of the overall project and its separate components. We used this matrix to develop evaluation tools, coordinate evaluation between the two organization’s project components, and, where appropriate, build each partners’ evaluation questions into the methods of the other.

In general, program evaluation can be broken down into three main categories: outcome evaluation¹ that measures the long-term, overall changes in health status intended by the program; impact evaluation that measures intermediate changes needed to produce the longer-term outcomes; and process evaluation that monitors project implementation to ensure the highest quality possible is achieved in the project elements.

In *Healthy Foods, Healthy Moves: InForm Chicago*, we focused mostly on impact and process evaluation. We wanted to measure the impact of our project on behavior related to nutrition and physical activity – more specifically, the extent to which youth reached by our message consume the appropriate amount of fruits and vegetables, low-fat dairy, and water, and the hours they spend in physical activity or in screen-based sedentary activity. Impacts on knowledge and attitudes that would lead to changes in behavior were also of interest. Process evaluation was used to measure program quality and to document the implementation of the project, including the number of sites visited and students reached by the Go Team and the number of schools connected to nutrition and physical activity programs. Evaluation helped us to understand changes in the behavior of students reached by school-based services providers, the Go Team members and the service providers who engaged in the project, the organizations that hosted Go Team outreach events, and the effectiveness of our *5-4-3-2-1 Go!* message training for community-based organizations.

¹The terms “outcome evaluation” and “impact evaluation” may be used inversely depending on the discipline. For example, some fields refer to “impact” as the longer term change and “outcome” as the more proximal or intermediate. The key is to use the terms as they make sense to your project partners and to make sure they mean the same thing to all partners involved.

HOW TO REPLICATE, STEP BY STEP

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1. Share and discuss processes early. Take into consideration that partnering groups may have different approaches to evaluation. Partners should discuss goals, philosophy, methods, and reasons for evaluation early in the process.

2. Assess your capacity to conduct evaluations internally. Some organizations will come together with ample resources and skills for program evaluation. Others will come to the table with minimal to no evaluation experience. It may be necessary to hire or otherwise engage an evaluation consultant. An expert in childhood obesity content can provide consultation about tools and methods to use in evaluating behavior and environmental changes related to nutrition and physical activity.

Tip: Consider contacting a local university to find consultants with expertise in this area.

3. Jointly develop an evaluation plan. Project and evaluation partners should work together to develop an evaluation plan. That way, the needs and capacities of all partners will be taken into account.

Tip: Identify early in the evaluation planning process the outcomes, impact, and process elements you wish to monitor and measure.

Tip: If partners are working with similar audiences in different contexts, look for overlap and align data collection methods by, for example, including the same questions on multiple instruments.

4. Create a joint evaluation matrix or model. This model should describe the elements of the project and the changes expected to occur as a result of each element. Partners should come to agreement on key research questions that emerge from the model.

5. Establish a plan to respond to evaluation barriers. Be prepared for problems in implementation and be flexible in adjusting collection methods and timing.

6. Target communities for evaluation and data collection where integrated school and community activities occur. This will be an advantage when you are trying to assess changes in knowledge, attitudes and behavior related to the message.

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Project Management: Coordinated Community Evaluation

In tandem with *Healthy Foods, Healthy Moves: InForm Chicago*, CLOCC implemented an additional community evaluation of message impact. While it was not part of this project, it was coordinated with our evaluation questions. We are sharing our experience and process in case you choose to implement this level of evaluation. It was a significant undertaking in terms of funding and resources, which were secured outside of *Healthy Foods, Healthy Moves: InForm Chicago*.

CLOCC has been disseminating the *5-4-3-2-1 Go!* message since 2003. Dissemination mechanisms beyond *Healthy Foods, Healthy Moves: InForm Chicago* included; materials available through the CLOCC website and at special events, integrating the message into the work of city and state government agencies, and using mass media. CLOCC engaged an external evaluator to conduct a community-level evaluation of *5-4-3-2-1 Go!* dissemination.

CLOCC chose to work with an external evaluator for several reasons. First, the scope of the project was beyond the capacity of CLOCC's staff. Second, an evaluator with experience in projects related to social marketing would have necessary content knowledge that CLOCC staff didn't have. Third, external evaluation could lend more credibility to the results than an evaluation done by internal staff members.

The goals we shared with the evaluator were to measure the reach and exposure of all of the vehicles for message dissemination combined and separately. The external evaluator developed a new survey instrument and household interviews were chosen as the data collection method. By using telephone numbers and marketing data, he was able to create a sample that was likely to include families with young children. CLOCC and the evaluator hired staff to implement the survey – through interviews and focus groups – and analyze the collected information.

HOW TO REPLICATE, STEP BY STEP

- 1. Identify an evaluator.** If you choose to work with an external evaluator, pick that evaluator early in the process. An external evaluator can provide an objective perspective and input while managing the evaluation.

Tip: Consider university researchers, evaluation centers, or private evaluators. The American Evaluation Association can be a useful network to connect to in order to find local evaluators.

Tip: If the external evaluator is not local, including a local evaluator as a consultant can help to ensure an ongoing local relationship that will add value to future efforts.

Tip: Identify ways for the external evaluator to keep the evaluation sub-committee or any other relevant groups informed of progress and involved in key discussions related to evaluation framework or approaches.

- 2. Develop a plan to reach the desired number of respondents.** Regardless of the methods you choose, you will need to contact a larger number of people than you eventually will need in your sample. This surplus will help to ensure you meet your sample size goals as refusals, inability to contact, or address and phone number errors begin to reduce the number of people who actually participate.

Tip: Develop a brief method for screening potential respondents to make sure they are eligible for your evaluation study. For example, if you need to interview certain kinds of households, screening households for eligibility, though more time consuming, is likely to be less expensive than purchasing market data to help focus selection.

Tip: Recruit more people than you need for focus groups, but make sure you have enough in your budget just in case everyone you invite actually shows up!

Tip: Schedule interviews as you need them so that you don't lose people while they wait for their appointment and you don't have more people scheduled than you actually need.

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Attachments

Style Guide for Logo

Project Talking Points

1-page Project Description

Draft Press Release

Project Evaluation Matrix



Style Guide for Logo Use

The logo

The Healthy Foods, Healthy Moves: InForm Chicago “logo” is defined as the combination of the graphic element and the type “Healthy Foods, Healthy Moves [line break] InForm Chicago.” These elements are in a precise and fixed spatial relationship. The logo should never be changed, and the graphic and text must always be used together. The minimum size at which the logo may be reproduced is 1 inch wide.

Logo reproduction in color

The logo may only be reproduced in three specific variations depending on the requirements and limitations of the communication requirements:

1. the graphic element in CMYK colors (below) or PMS equivalent and the type in black
 - Figure is M 100, Y 100, K 1.18
 - Ball/fruit is C 9.41, M 46.27, Y 100
 - Leaves are C 74.51, M 31.76, Y 100, K 18.43
2. the figure, leaves and type in black and the ball/fruit 75% screen black
3. the figure, leaves and type in a solid color and the ball/fruit 60% screen of the same solid color

Typography

The logo’s type family is Whitney - Whitney bold for “Healthy Foods, Healthy Moves” and Whitney medium for “InForm Chicago”



Talking Points

Healthy Foods, Healthy Moves: InForm Chicago builds healthier communities by promoting the importance of good nutrition and physical activity.

Project Description

- **Healthy Foods, Healthy Moves: InForm Chicago** provides information about healthy eating and living to Chicago youth of all ages, in school and community settings.
- The project is a partnership between Communities In Schools of Chicago (CISC) and the Consortium to Lower Obesity in Chicago Children (CLOCC).
 - CISC connects and trains Chicago Public Schools and community service providers to address students' non-academic needs.
 - CLOCC is a nationally recognized consortium that brings together hundreds of organizations and individuals to confront childhood obesity and to promote healthy and active lifestyles for children throughout the Chicago metropolitan area.
- **Healthy Foods, Healthy Moves: InForm Chicago** is working to reduce childhood obesity in Chicago with an evidenced-based healthy lifestyle message promoted in a variety of settings.
- This unique project selects and trains teens, school staff, and neighborhood program providers to be nutrition and physical activity message ambassadors to support good choices for a healthy lifestyle.

Goals of the Project

- Build awareness in schools and train program providers and school staff to provide students with high quality nutrition and physical activity services that address knowledge and behavior gaps.
- Work with community partners to promote *5-4-3-2-1 Go!*
 - *The 5-4-3-2-1 Go! message promotes healthy lifestyle choices for children. It represents 5 servings of fruits and vegetables a day, 4 servings of water a day, 3 servings of low-fat dairy a day, 2 hours or less of screen time a day, and 1 hour or more of physical activity a day.*

In October 2008 CISC and CLOCC will host a national conference to share tools and findings of the Healthy Foods, Healthy Moves: InForm Chicago project and encourage replication of the Chicago model.



Healthy Foods, Healthy Moves: InForm Chicago builds healthier communities by promoting the importance of good nutrition and physical activity.

Project Description

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 - CISC connects and trains Chicago Public Schools and community service providers to address students' non-academic needs.
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- **Healthy Foods, Healthy Moves: InForm Chicago** is working to reduce childhood obesity in Chicago with a science-based healthy lifestyle message promoted in a variety of settings.
- This unique project selects and trains teens, school staff, and neighborhood program providers to be nutrition and physical activity message ambassadors to support good choices for a healthy lifestyle.
- After successfully implementing this project in Chicago, CISC and CLOCC will host a national conference to support replication of this work in other U.S. cities.
- The PepsiCo Foundation has provided a three-year, \$1.7 million grant to support the implementation and replication of this project.

Goals of the Project:

The project will develop and deploy ambassadors with a unified nutrition and healthy lifestyle message.

- *CLOCC will create a Go Team of teenagers to serve as role models by engaging young children (ages 3-7) and their caregivers in activities that encourage healthy eating and physical activity.*
- *CISC will build awareness in schools and train program providers and school staff to provide students with high quality services that address knowledge and behavior gaps.*

CLOCC and CISC will work with their networks of community partners to promote

5-4-3-2-1 Go!

- *The 5-4-3-2-1 Go! message promotes healthy lifestyle choices for children. It represents 5 servings of fruits and vegetables a day, 4 servings of water a day, 3 servings of low-fat dairy a day, 2 or less hours of screen time a day, and 1 or more hours of physical activity a day.*

In year three of the grant, CLOCC and CISC will host a national conference to share tools and findings and encourage replication of the Chicago model.

DRAFT PRESS RELEASE

COMMUNITIES IN SCHOOLS OF CHICAGO AND CONSORTIUM TO LOWER OBESITY IN CHICAGO CHILDREN JOIN FORCES TO CREATE “HEALTHY FOODS, HEALTHY MOVES: INFORM CHICAGO”

Alliance Encourages Youth to Lead the Community in Making Healthier Choices

CHICAGO, IL – Date – Communities In Schools of Chicago (CISC) and the Consortium to Lower Obesity in Chicago Children (CLOCC) announced today that they have joined forces to form **Healthy Foods, Healthy Moves: InForm Chicago**, an initiative designed to promote healthy nutrition and physical activity choices in Chicago children. The program will create ambassadors throughout communities sharing a unified message about healthy lifestyles. It will be funded by a \$1.75 million grant from the PepsiCo Foundation paid out over the next three years.

Healthy Foods, Healthy Moves: InForm Chicago will focus on educating Chicago Public Schools students on the basics of a healthy, balanced diet and the importance of incorporating physical activity in their everyday lives. These messages will be spread by youth ambassadors from six diverse Chicago communities who will visit schools, youth and service organizations and community events.

“The more the children hear this message of Healthy Foods, Healthy Moves, the easier it will be for them to make the right choices now and in the future,” said John Greening, a member of the CISC board. “Ultimately, it is our goal that the themes of this initiative will extend throughout schools and youth and service organizations into all reaches of our community and improve lives for people of all ages.”

The core message the ambassadors will be teaching is **5-4-3-2-1 Go!** This message encourages children to eat 5 servings of fruits and vegetables daily; drink at least 4 servings of water daily; eat 3 servings of low fat dairy products daily; limit “screen time” (including TV, computers, and video games) to less than 2 hours daily; and get at least 1 hour of physical activity daily. By following these 5 guidelines, children can improve their health, increase their energy level and develop habits that will benefit them throughout their lives.

“Studies show that Chicago-area children have some of the highest obesity rates ever recorded,” said CLOCC Executive Director Dr. Matt Longjohn. “Our kindergarten-aged children are overweight at more than twice the national average and obesity in our predominantly minority

neighborhoods has been found to be as high as four times the published national rate. Changing this situation has to be our number one priority.”

Longjohn continued, “Our ambassadors will reach out to children in every possible environment through many different channels and sources. The more the children hear this message, the more likely it is that they will make healthier choices.”

Healthy Foods, Healthy Moves: InForm Chicago is being watched nationally as a pilot program, and plans are being made to replicate this initiative in communities all over the country to assist in combating the childhood obesity epidemic in the United States.

About CISC

Communities in Schools of Chicago (CISC) helps students succeed by creating connections and building lasting relationships between Chicago’s schools and community resources. With a decade of expertise managing community resources, CISC is extremely effective in managing the delivery of free social, emotional and health services to Chicago public school students.

About CLOCC

The Consortium to Lower Obesity in Chicago Children (CLOCC) is a childhood obesity prevention program housed within the Center for Obesity Management and Prevention at the Children’s Memorial Research Center of Children’s Memorial Hospital. CLOCC’s mission is to confront the childhood obesity epidemic by promoting healthy and active lifestyles for children throughout the Chicago metropolitan area. Its work fosters and facilitates connections between childhood obesity prevention researchers, public health advocates and practitioners, and the children, families and communities of Chicagoland.

About PepsiCo Foundation

The PepsiCo Foundation invests in health and wellness, youth development, higher education, diversity initiatives, and community organizations valued by employees. PepsiCo Foundation is committed to addressing the needs of today’s youth, focusing on physical activity/fitness and skill development, primarily among urban and low-income youth, of leadership, entrepreneurship and other life skills to prepare them for college and the workforce.

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Developing and Managing a Partnership | Project Evaluation Matrix

Healthy Foods, Healthy Moves: InForm Chicago PROJECT EVALUATION MATRIX						
Project Component	Objectives	Evaluation Questions	Evaluation Sample	Methods and measures to address research questions	Tools	Outcomes
School-based message delivery	To increase students' exposure to nutrition and physical activity programming and to integrate 5-4-3-2-1-Go! messaging into current curricula delivered in schools	<ol style="list-style-type: none"> 1. What is the impact of building awareness around nutrition and physical activity at the school level? 2. How is the 5-4-3-2-1 message being communicated by CISC partners? 3. What is the impact of nutrition and physical activity programming at the individual level? 4. How does 5-4-3-2-1-Go! messaging fit with existing programs/curricula? <ul style="list-style-type: none"> • What changes do providers make? • What support do providers need to integrate? 	<ol style="list-style-type: none"> 1. School-aged children 2. School-based service providers 	<ol style="list-style-type: none"> 1. Changes and trends in school-, grade- and classroom-wide responses 2. Student knowledge and behavior 3. Service provider implementation of curriculum 4. Surveys, focus groups, school and agency interviews as needed 	<ol style="list-style-type: none"> 1. Personal Health Inventory (PHI) for school children 2. Efforts to Outcomes (ETO), database used by CISC staff 3. CISC program evaluations 4. Observation checklists 	<ol style="list-style-type: none"> 1. An increase in participating students' knowledge in five targeted nutrition and physical activity areas; 2. A positive change in participating students' reported behavior, both healthy eating and their activity level around the five targeted messages; 3. Greater school awareness of the urgency around healthy lifestyle issues, including obesity, and prioritization of education in this area; 4. An increase in the number of educators promoting the 5-4-3-2-1 message in targeted communities; 5. Existing healthy lifestyle educators will improve the impact of their programming;
Community-based message delivery	1. Recruit Potential Go Team Members (Start Jan, complete April) (10-15 from each neighborhood)	<ol style="list-style-type: none"> 1. What strategies are used? 2. How do the strategies work? 3. Which strategies are effective? 4. What recruitment challenges arise? 5. What is the rate of turn-over/attrition among participants? 	<ol style="list-style-type: none"> 1. Go Team! Members (those selected, and some info on those not selected) 2. Go! Team Staff 	<ol style="list-style-type: none"> 1. Documentation of selection process (e.g., criteria) 2. Documentation of those selected and those not selected 3. Youth coordinator (team member evaluations) 4. Observers of Go! Team Events 	<ol style="list-style-type: none"> 1. Intake forms 2. Resumes 3. Participant profiles 4. Exit interview 5. Team member evaluations 6. Observer checklist/notes 	<ol style="list-style-type: none"> 1. 12 Go Team members representing the 6 CLOCC vanguard communities. (effectiveness will be based in part on quality of team)

Healthy Foods, Healthy Moves: InForm Chicago PROJECT EVALUATION MATRIX						
Project Component	Objectives	Evaluation Questions	Evaluation Sample	Methods and measures to address research questions	Tools	Outcomes
Community-based message delivery (continued)	2. Select 12 Go! Team members, 2 from each neighborhood	<ol style="list-style-type: none"> 1. How are Team members selected? 2. What are the strengths of the selection process? 3. What are the challenges of the selection process? 	<ol style="list-style-type: none"> 3. Host organizations 4. 5-4-3-2-1 Go! training workshop participants 	<ol style="list-style-type: none"> 1. Documentation of selection (observing, scoring, interviewing) process <ul style="list-style-type: none"> • What are the strengths of the processes? • What are the weaknesses? 	<ol style="list-style-type: none"> 1. Youth Coordinator log 2. Team member evaluations 3. Observer checklist/notes 	<ol style="list-style-type: none"> 1. 12 Go Team members representing the 6 CLOCC vanguard communities. (effectiveness will be based in part on quality of team)
	3. Train 12 Go Team! Members from each of the 6 CLOCC vanguard communities? (Start with training through Youth summit)	<ol style="list-style-type: none"> 1. What training strategies are used? 2. How well do these strategies work? 3. What content areas are covered? 4. How prepared is the Go! Team? <ol style="list-style-type: none"> a. How efficacious do the participants feel after training? b. How skilled is the Team? <ol style="list-style-type: none"> 1. Does training increase health promotion knowledge and skills? 2. Does the team become cohesive? 3. Do team members deliver message outside of Go! Team events? 4. Is the Team satisfied with the program? <ol style="list-style-type: none"> 1. Are logistics working (payment, travel, etc.) 2. Does team enjoy the work? 3. Is membership leading to health career choices? 		<ol style="list-style-type: none"> 1. Curriculum review/characterization 2. Semi-structured interviews on (Pre/Post) 3. Observational data on training (what is happening) 4. Focus groups with participants to understand group dynamics 		

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Community-based message delivery (continued)	<p>4. To deliver 5-4-3-2-1 Go! messages to children, parents and organizations (May – through Youth Summit)</p> <p>5. To train community organizations on use and support of the 5-4-3-2-1 Go! message</p>	<p>1. How many children, parents and organizations are reached?</p> <p>2. How is the message delivery planned?</p> <p>3. How are messages received?</p> <p>4. What approaches are effective and are not effective?</p> <p>5. What settings are optimal to deliver the messaging?</p> <p>6. How do organizations utilize the message?</p>		<p>1. Track the intervention activities (schedule of Go Team activities, obtain documentation about events they appeared at, purpose of events (e.g., which part of 5-4-3-2-1 was discussed at events, how were messages delivered (e.g., through some sort of exercise, music, direct communication by Go Team member, attendance, information distributed, etc.)</p>	<p>1. Records of events and characterization of audience addressed</p> <p>2. Networker logs</p> <p>3. Semi-structured Interviews/FG</p> <p>4. Video and still photography piece (qualitative data on what the youth think about their footage and the final product(s))</p> <p>5. Training workshop evaluation forms</p> <p>6. Training workshop follow-up survey</p>	<p>1. Identification of high yield venues/opportunities</p> <p>2. Effective communication to children and parents (this maybe hard to obtain at this level but possible through community level data collection)</p> <p>3. Individual and group growth as Go Team members</p> <p>4. Individual and group growth as health advocates</p> <p>5. Empowered youth leaders with improved behaviors including an understanding of health determinants, health careers, and access to community leaders.</p> <p>6. Partnerships will demonstrate ability to identify and train Go Teams and form and sustain relationships between these educators and schools, community centers and other points of access to children and families.</p> <p>7. Organizations will change the way they support the 5-4-3-2-1 Go! recommendations in their programming</p>