

Action Communities for Health Innovation and
EnVironmental Change

ACHIEVE

Sustaining the Movement



Developed by:
ACHIEVE National Organizations
September 2012

Dear ACHIEVE Leaders,

It is with great admiration, and enthusiasm for the future, that we share this ACHIEVE Resource Document. Over the last few years, we witnessed individuals and organizations transform into a movement of communities working toward creating healthier environments for the betterment of future generations. We now see new segments of sidewalks where there were once only “goat trails,” and community gardens that not only provide bounty for the individuals working the soil, but also provide donations to local food pantries and senior centers. We have witnessed mayors and city councils embrace the philosophy of “health in every policy” and reach out to your coalitions for education, guidance and model policy examples. Most compelling are the testimonials from individuals touched by the improvements implemented by your coalitions, like the employee who now has access to a farmer’s market at work, or who has lost weight due to the new walking track, and support of co-workers to ‘get moving.’

But, it is the stories from students and children that bring the most joy; when we hear about children and teenagers learning to garden; sharing that knowledge with their families, or engaging in activities that will provide a foundation for life-long physical activity. These are lives that you cannot even imagine you are impacting. It is the children who will grow up to become parks directors, Y members and health department staff, advocates for health, and even future community leaders. You have touched a generation, and the benefits will be reaped for years to come. We thank you for this work. We thank you for your efforts, your partnership and your commitment. This movement would not be possible if not for your tireless dedication.

We hope this document will serve as a resource for your needs as a coalition as you continue to move your coalition forward. We hope that you share this knowledge and your wisdom with neighboring communities and communities seeking your counsel. You are now the expert; you are now the teacher, and we trust you will spread your skills and resources.

We wish you all the best,

Your ACHIEVE National Partners



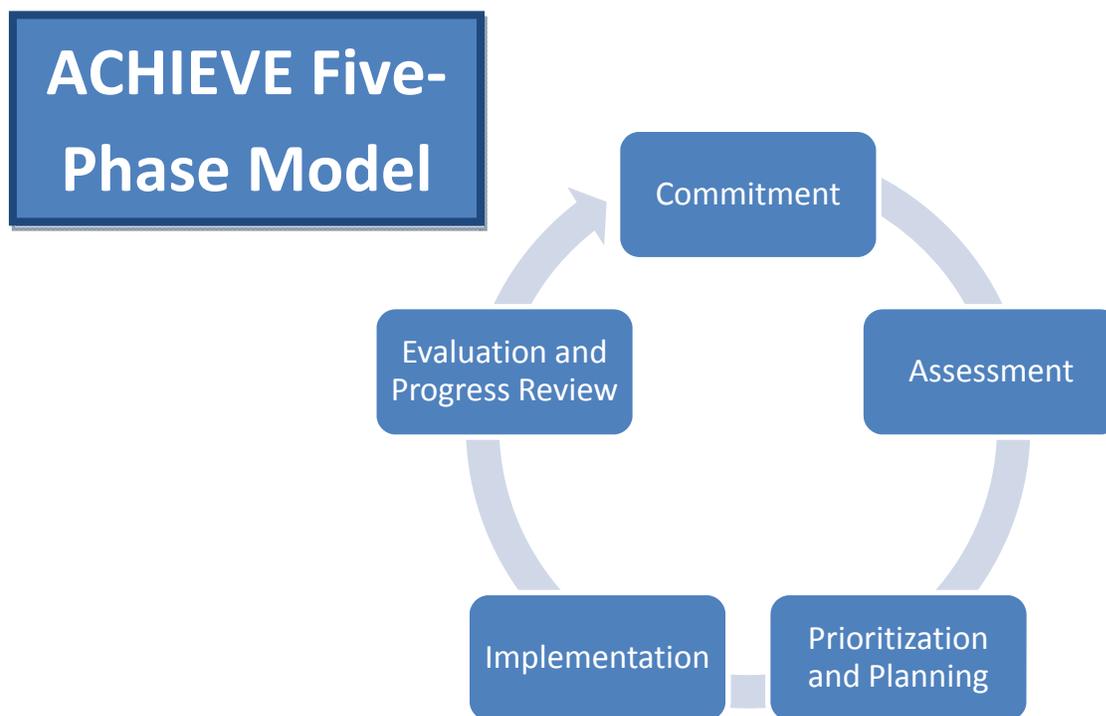
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ACHIEVE

ACHIEVE is a partnership between communities and national organizations joined in a movement to create healthier places to live, work, learn and play. At the local level, ACHIEVE communities bring together a coalition of concerned community leaders and members who pursue a comprehensive approach to create healthy policy, systems, and environmental improvement strategies for this and future generations. It provides local leaders and community members with learning opportunities to sharpen their skills for empowering communities to take local action in solving specific health problems. Community leaders and members use a strategic approach to address physical activity, nutrition, tobacco cessation, obesity, diabetes, and cardiovascular disease, to ensure that healthy living is within reach of the people who live in those communities. Through the work of broad-based and diverse coalitions, ACHIEVE heightens the understanding of people who live and work in these communities about the role each plays in creating and sustaining healthy environments.

ACHIEVE was built upon evidence-based public health intervention research such as the Planned Approach to Community Health (PATCH) and the PRECEDE model, and relied on a five-phase model: (1) commitment, (2) assessment, (3) prioritization and planning, (4) implementation, and (5) evaluation and progress review. Local coalitions were created in each community as part of the commitment process. Communities used tools provided by the national partners and the CDC for assessment, prioritization, and planning.



ACHIEVE Website and Social Media

The ACHIEVE Communities Website is a community portal that provides information on the initiative, allows communities to interact amongst each other, and also allows a community to communicate internally. The website has two distinct parts:

The first part is the public website (<http://achievecommunities.org>). This site is accessible to the general public and disseminates information about the ACHIEVE Communities. Partners, coaches, and CHART members can contribute to the public site.

The second part is the collaboration site (<http://collaborate.achievecommunities.org>) which is used only by ACHIEVE communities to connect with their CHART, the national partners, and other ACHIEVE communities. This allows users to share documents, contribute to a discussion, add announcements, and add to a shared calendar.

The funding period of the ACHIEVE initiative ends September 29, 2012. However, the ACHIEVE Communities Website will still be available and accessible to communities until September 30, 2014. NACCHO staff will continue to update the website and will be available to answer questions and inquiries related to the website from October 2012–September 2013.



ACHIEVE Website: TA and Activities Beyond September 2012	Oct 2012– Sept 2013	Oct 2013– Sept 2014
Public Site		
Available and visible to communities and the public	X	X
Updated with resources, events, and funding opportunities	X	
ACHIEVE communities can update their information on their public page	X	
ACHIEVE communities can submit events, resources, and news items	X	
Collaboration Site		
ACHIEVE communities can log on and access the private site/SharePoint	X	X
ACHIEVE communities can interact through posts, documents, and discussions	X	X
ACHIEVE communities can update their contact information on their private pages	X	X
General		
Technical assistance from NACCHO staff available on how to use the website/to answer any website questions through info@achievecommunities.org	X	

For future inquiries about the website, please contact NACCHO staff by emailing info@achievecommunities.org or Laura Horne, Senior Program Analyst, at lhorne@naccho.org.

ACHIEVE Social Media

Stay informed of the latest chronic disease prevention information and keep in touch with what other ACHIEVE communities are discussing, by joining the ACHIEVE social media networks:



Facebook

Share: <https://www.facebook.com/ACHIEVENACDD>



Twitter

Follow: https://twitter.com/#!/NACDD_ACHIEVE1



Youtube

Watch: www.youtube.com/user/ACHIEVEingHealth



Flickr

View: <http://www.flickr.com/groups/achieve>



LinkedIn

Connect: <http://linkd.in/n1GXTn>

Community Commons



www.communitycommons.org

Community Commons is a FREE interactive mapping, networking, and learning utility for the broad-based healthy, sustainable, and livable communities' movement.

- Over 7000 GIS data layers at state, county, zip code, block group, tract, and point-levels;
- Contextualized mapping, visualization, analytic, impact and communication tools and apps;
- Searchable profiles of hundreds of place-based community initiatives. Initiative profiles provide insight into “what’s working;” sharing best practices through both narrative and multi-media, the Commons provides a dynamic mechanism for connecting and learning;
- Peer learning forums, hosted by leading national Technical Assistance providers that bring together peers and colleagues to explore issues and challenges.



What can you do on the Commons?

- **Connect** - Easily find what is happening through the **Map of the Movement**.
- **Engage** - Stay up-to-date on news and developments by exploring our **News** and **Features** sections.
- **Visualize** - Through **Make a Map** you can explore the thousands of data sets the Commons has to offer and use them to make dynamic, multi-layer maps for your state, county, city, or neighborhood.
- **Share** - The Commons is not just a place to extract information, but also a place to share and rate **Resources**.

*For a step-by-step introduction to Community Commons, view the **ACHIEVE** webinar:*

http://www.sophe.org/Sophe/PDF/HealthyCommunitiesHealthyStrategies_StayingConnectedthroughCommunityCommons.wmv

The ACHIEVE Group on Community Commons

Here are a few tips to get you started:

- Register for a free account on Community Commons at www.communitycommons.org or log in to an existing account
- Click the “ENGAGE” tab → then click “GROUPS”
- Find and click on the Group labeled “ACHIEVE”
- Click the “JOIN GROUP” button and you’re in!

What can you do in the ACHIEVE Group?

- Connect to other ACHIEVE communities via member profiles and the Map of the Movement
- Post updates, ask questions, and share stories about your ACHIEVE community
- Share pictures, videos, links, and documents with fellow ACHIEVE communities
- Create and share maps – Community Commons has over 7,000 data layers for communities to access and use to make maps
- Upload and tag documents, Excel files, PowerPoint presentations, and PDFs
- Co-create documents with your fellow ACHIEVE communities, see real-time edits, and track changes
- Create and/or participate in targeted discussion forums
- Sign up for an RSS feed and stay up-to-date with ACHIEVE group updates, posts, and discussions

Have questions or need assistance?

- Click the orange “FEEDBACK” tab on any page and send us an email
- Sign up for Community Commons Office Hours and receive one-on-one assistance
- Visit the “HELP” section to access training videos, archived webinars, and mapping exercises

Suggested Timeline

It is our sincere hope that you will continue your ACHIEVE efforts in the days, weeks, months, and years to come. To facilitate that process we have provided a list of activities that will help you, as well as, a suggested timeframe to complete them. Please note: these are simply suggestions and in no way are required. If anything is required of you after September 29, 2012, the National Organization that provided your funding will inform you of such.

ACHIEVE Activity	Suggested Time for Completion
CHANGE re-assessment	Summer
Review CHANGE re-assessment data	Fall
CAP revisions/updates	Spring/Fall
Sign up for Community Commons	September 2012
CHART meetings	Monthly
Share CAP progress with community	On-going
Mentors: Continued support to 2012 communities	(at least) February 2014

Recommended Resources: Coalition Retention

ACHIEVE Webinar: Coalition Retention and Sustainability

Recording: http://www.sophe.org/Sophe/PDF/ACHIEVE_Sustainability.wmv

Slides: <http://www.sophe.org/Sophe/PDF/sustainability.pdf>

ACHIEVE Webinar: The Sustainability Planning Guide, Coalition Building

Recording: <http://www.sophe.org/Sophe/PDF/Webinars/SustainabilityPlanningGuidePart3CoalitionBuilding.wmv>

Slides: http://www.sophe.org/Sophe/PDF/Webinars/ACHIEVEWebinarSeries_Part3.pdf

Keys to Building a Strong CHART, Presentation from 2012 Coaches Meeting

http://www.achievecommunities.org/upload/ACHIEVE_2012_CM-teams_-1.ppt

The ACHIEVE National Partners shared valuable lessons learned and tips for developing and maintaining coalitions at the 2012 ACHIEVE Coaches Meeting.

SOPHE Factsheets on Coalition Development

Society for Public Health Education

www.sophe.org

SOPHE has developed five easy to use fact sheets to assist and guide communities and leaders through the process of building a coalition.



NACCHO's Coalition Tools Developed by Altarum Institute

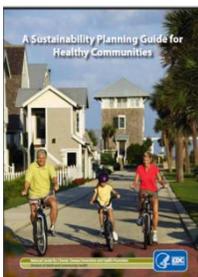
<http://www.achievecommunities.org/upload/Coalition-development-tools.docx>

This toolkit includes several tools that you may find useful in maintaining your CHART, developed with financial support by the Altarum Institute and the Virginia Early Childhood Foundation.

NACCHO's CHART Resource Packet

<http://www.achievecommunities.org/upload/CHART-Resource-Packet-February-2012.doc>

These sample invitation letters, commitment cards, agendas and by-laws have been helpful to ACHIEVE communities in developing their coalitions and periodically revisiting their structures and processes for communication.



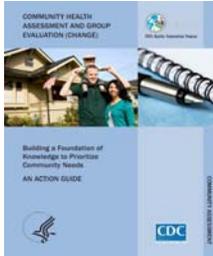
Sustainability Planning Guide

Centers for Disease Control and Prevention

http://www.cdc.gov/healthycommunitiesprogram/pdf/sustainability_guide.pdf

The Sustainability Planning Guide is a synthesis of science- and practice-based evidence designed to develop, implement, and evaluate a successful sustainability plan. For coalition maintenance tips, view pages 13-42.

Recommended Resources: Assessment



Community Health Assessment and Group Evaluation (CHANGE) Action Guide

Centers for Disease Control and Prevention, 2010

<http://www.cdc.gov/healthycommunitiesprogram/tools/change.htm>

- Identify community strengths and areas for improvement.
- Identify and understand the status of community health needs.
- Define improvement areas to guide the community towards population-based strategies that create a healthier environment
- Assist with prioritizing community needs and consider appropriate allocation of available resources.

NACCHO's CHANGE Resources

<http://www.achievecommunities.org/2012resources.cfm>

Scroll down this page to “CHANGE Resources” to find a recorded webinar on the CHANGE tool, CHANGE survey questions in Microsoft Word format, sample data collection methods, and a CHANGE glossary of terms and dialogue guide.

NACCHO's Resource Center for Community Health Assessments and Community Health Improvement Plans

<http://www.naccho.org/topics/infrastructure/CHAIP/chachip-online-resource-center.cfm>

The Resource Center provides practical, customizable tools and resources to all local health departments (LHDs) in a central and publicly accessible location. The resource center is intended to support LHDs and their partners in completing community health improvement processes, including the conduct of a community health assessment and the development of a community health improvement plan, for the purpose of improving the health of local communities.

County Health Rankings

<http://www.countyhealthrankings.org/>

The *Rankings* are based on a model of population health that emphasizes the many factors that, if improved, can help make communities healthier places to live, learn, work and play.



Recommended Resources: Planning



A Sustainability Planning Guide for Healthy Communities

Centers for Disease Control and Prevention, 2011

http://www.cdc.gov/healthycommunitiesprogram/pdf/sustainability_guide.pdf

This Guide provides the science- and practice-based evidence to help public and community health professionals develop a sustainability plan and learn key sustainability approaches like policies, partnerships, organizational strategies, and communication plans.

NACCHO's Community Action Plan (CAP) Tools

<http://www.achievecommunities.org/2012resources.cfm>

Scroll down this page to "CAP Resources" to find the CAP Guidebook, CAP template, a recorded webinar on CAP development, and sample CAPs.

Community Health Resources

http://apps.nccd.cdc.gov/dach_chaps/Default/index.aspx

Search or browse through the Community Health Resources Database to plan, implement, and evaluate community health interventions and programs that address chronic diseases. Developed by CDC's Community Health and Program Services Branch, the database includes links to hundreds of useful planning guides, evaluation

frameworks, communications materials, health risk factors data and statistics, fact sheets, scientific articles, key reports, and state and local program contact information.



NACCHO's Resource Center for Community Health Assessments and Community Health Improvement Plans

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Recommended Resources: Implementation

ACHIEVE Resources from 2012 Coaches Meeting and Action Institute

Coaches Meeting 2012: <http://www.achievecommunities.org/CM2012.cfm>

Action Institute 2012: <http://www.achievecommunities.org/ai2012.cfm>

ENACT Local Policy Database

Strategic Alliance and Prevention Institute

<http://eatbettermovemore.org/sa/policies/>

Use the search tools in this database to find one or more local policies. Search using key words like farmers market or open space, or use the Guided Search tool to identify policies by topic, setting, and jurisdiction.



Guides to Community and Clinical Preventive Services

Centers for Disease Control and Prevention

<http://www.thecommunityguide.org/index.html#topics>

The Community Guide is a credible resource based on a scientific **systematic review process** and answers questions critical to almost anyone interested in community health.

Leadership for Healthy Communities Action Strategies Toolkit

<http://www.leadershipforhealthycommunities.org/index.php/home-toolkitnav-161>

The policies and resources in the Leadership for Healthy Communities Action Strategies Toolkit are a collection of current best approaches that have been identified, evaluated and selected by Leadership for Healthy Communities and the policy-maker organizations that have participated in the program.

Strategic Alliance for Health (SAH) Communities Website

Centers for Disease Control and Prevention

<http://www.cdc.gov/healthycommunitiesprogram/communities/sah/index.htm#guides>

Fourteen **Implementation Guides** were developed by CDC's Strategic Alliance for Health communities, and can be downloaded to assist other communities in replicating specific evidence- and practice-based interventions that reduce the burden of chronic disease.



NACO Healthy Counties Database

National Association of Counties

<http://www.naco.org/programs/csd/pages/healthycountiesdatabase.aspx>

Search for model policies, programs and initiatives that counties nationwide have enacted to support overall community health.

NRPA Case Studies - Successful Practices for Building Healthier Communities

National Recreation and Park Association

<http://www.nrpa.org/achieve/>

This resource documents successful practices that communities across the country have implemented to promote health and wellness initiatives through ACHIEVE. It is our hope that other park and recreation agencies can learn from these practices to create positive behavior changes and improve the health of people living in their communities.

NRPA Archived Webinars

National Recreation and Park Association

<http://www.nrpa.org/Professional-Development/E-Learning/Webinars--Archived/>

NRPA has more than a dozen archived webinars focused on health and wellness topics within the park and recreation field. These webinars will assist all sectors in partnering with park agencies to increase health and livability in communities nationwide. Topics include: partnering with schools, planners, and doctors; tobacco-free parks; increasing access to nutritious foods; and increasing physical activity opportunities.

Recommended Resources: Evaluation

Developing an Effective Evaluation Plan

Centers for Disease Control and Prevention

<http://www.cdc.gov/obesity/downloads/CDC-Evaluation-Workbook-508.pdf>

This workbook applies the CDC Framework for Program Evaluation in Public Health. The Framework lays out a six-step process for the decisions and activities involved in conducting an evaluation.

Framework for Program Evaluation

Centers for Disease Control and Prevention

<http://www.cdc.gov/eval/framework/index.htm>

A practical, non-prescriptive tool, the evaluation framework summarizes and organizes the steps and standards for effective program evaluation.



Making the Case for Healthy Living Strategies

YMCA of the USA

<http://ymca.net/healthier-communities-guide/>

YMCA of the USA's (Y-USA) *Making the Case to Stakeholders: Linking Policy and Environmental Strategies to Health Outcomes* is a guide based on scientific evidence that demonstrates how certain strategies can lead to specific short-term, intermediate, and long-term outcomes.

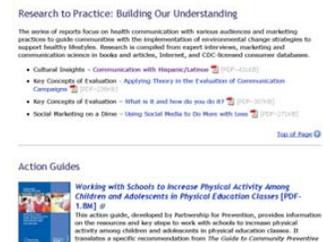
Research to Practice: Building Our Understanding

Centers for Disease Control and Prevention

<http://www.cdc.gov/healthycommunitiesprogram/tools/index.htm#rp>

The series of reports focus on health communication with various audiences and marketing practices to guide communities with the implementation of environmental change strategies to support healthy lifestyles. Research is compiled from expert interviews, marketing and communication science in books and articles, Internet, and CDC-licensed consumer databases.

- Communication with Hispanics/Latinos:
http://www.cdc.gov/healthycommunitiesprogram/tools/pdf/hispanic_latinos_insight.pdf
- Applying Theory in the Evaluation of Communication Campaigns:
http://www.cdc.gov/healthycommunitiesprogram/tools/pdf/apply_theory.pdf
- Key Concepts of Evaluation:
http://www.cdc.gov/healthycommunitiesprogram/tools/pdf/eval_planning.pdf
- Social Marketing on a Dime:
http://www.cdc.gov/healthycommunitiesprogram/tools/pdf/social_marketing.pdf



Recommended Resources: Communication

ACHIEVE Media Guide

<http://www.achievecommunities.org/upload/ACHIEVE-2012-Media-Guide-v4.pdf>

This Media Guide for ACHIEVE Communities supports your efforts to create a healthier community by harnessing the power of the media to inform the public.



NACDD ACHIEVE Podcasts

www.achievecast.com

Check out the Achievecast.com website for tips on developing a social media plan. Also listen podcasts of coaches talking about their experience with ACHIEVE.



Media Access Guide: A Resource for Community Health Promotion

Centers for Disease Control and Prevention

<http://www.cdc.gov/healthycommunitiesprogram/tools/pdf/mediaaccessguide.pdf>

This action guide is designed to assist communities with developing effective working relationships with the media and gaining valuable news coverage for health-related issues.

Social Media Toolkit

Centers for Disease Control and Prevention

http://www.cdc.gov/socialmedia/Tools/guidelines/pdf/SocialMediaToolkit_BM.pdf

The CDC's Social Media Toolkit helps you get started in social media by providing guidance for creating a social media strategy.



Success Stories in Building Healthier Communities Website

Centers for Disease Control and Prevention

http://www.cdc.gov/healthycommunitiesprogram/success_stories/index.htm

This website provides an easy-to-use tool to develop your story, guidance on how to write a success story, a downloadable worksheet to begin the pre-writing process, and more.

Making the Case for Healthy Living Strategies

YMCA of the USA

<http://ymca.net/healthier-communities-guide/>

This guide is based on scientific evidence that demonstrates how certain strategies can lead to specific short-term, intermediate, and long-term outcomes.



Recommended Resources: Funding

We highly recommend these resources to stay informed of new funding opportunities and prepare winning grant proposals.

ACHIEVE Website – Funding Opportunities

<http://www.achievecommunities.org/resources/funding.cfm>

NACCHO will continue to update this webpage with new funding opportunities. Visit often!

ACHIEVE Facebook and LinkedIn Pages

<https://www.facebook.com/#!/ACHIEVENACDD> | <http://linkd.in/n1GXTn>

“Friend” ACHIEVE on Facebook and LinkedIn to see funding opportunities and other resources on your newsfeed (and collaborate with other ACHIEVE communities).

Community Commons

<http://www.communitycommons.org/>

Become a member of this interactive site to receive healthy community funding updates and the latest resources.

Foundation Center Proposal Writing Short Course

<http://foundationcenter.org/getstarted/tutorials/shortcourse/index.html>

This website is a great resource for finding new funders, but it also hosts a free short course in proposal writing that you can complete on your own, in your timeframe.

Grant Resources Guide for the Built Environment

http://www.tchd.org/pdfs/cppw_tchd_grant_resources_guide.pdf

Interested in working on the built environment with local city planning and transportation experts? Be sure to read Tri-County Health Department’s guide to finding available grants.

Public Health Prevention Fund Grants

<http://www.hhs.gov/open/recordsandreports/prevention/announcements.html>

Links to funding opportunity announcements, requests for proposals, and other funding solicitations for activities funded from the Prevention and Public Health Fund. Announcements will be posted as they are issued.

Trust for America’s Health Wellness and Prevention Health Reform Digest

This is one daily e-mail alert you will not regret getting in your inbox! Includes the latest funding opportunities related to your work in addition to news updates and upcoming events. Sign up by sending an e-mail to Richard Hamburg at rhamburg@TFAH.org.

Long-Distance Communication Tools

Meeting Scheduling and Polling Tools:

Doodle | <http://www.doodle.com>

Doodle helps scheduling meetings and other appointments. Doodle is simple, quick, free and requires no registration.

Meeting Wizard | <http://www.meetingwizard.com/>

MeetingWizard automatically sends invitations to participants proposing alternate times, summarizes their responses, updates you on the results, sends confirmations, and sends optional reminders prior to meetings.

Social Media:

CDC's Social Media Toolkit

http://www.cdc.gov/socialmedia/Tools/guidelines/pdf/SocialMediaToolkit_BM.pdf

The CDC's Social Media Toolkit is designed to help you get started in social media by providing information for developing governance for social media, determining which channels will best meet your communication objectives, and helping you create a social media strategy.

Video Conferencing:

Google+ Hangouts | <http://www.google.com/+learnmore/hangouts/>

Hangouts let you video chat with up to 9 people, face-to-face-to-face. You can watch YouTube videos, wear pirate hats, or even doodle together.

Skype | <http://www.skype.com/intl/en-us/features/allfeatures/group-video-calls/>

Share, celebrate and collaborate from anywhere in the world. There's so much you can do together over group video.

Webinar Tools:

Go To Meeting | <http://www.gotomeeting.com/fec/>

GoToMeeting allows you to host an online meeting with up to 25 people – so you can do more and travel less. Using our web conferencing tool, you can share any application on your computer in real time. Attendees join meetings in seconds.

ReadyTalk | <http://www.readytalk.com/>

ReadyTalk makes it easy and affordable to conduct a polished webinar and leverage your recorded content. Event packages include everything needed to host a flawless web event at a fixed price.

PSE Strategy Speakers Bureau

Looking for a speaker to discuss healthy community strategies for your next community event? Here is a recommended list of organizations and individuals.

- **California Endowment Center for Healthy Communities** | http://calendow.org/about/Health_Exchange_Academy.aspx
The Health ExChange Academy is the Center for Healthy Communities' signature capacity-building program. It comprises a series of in-person training courses that increase participants' knowledge about and skills and abilities in primary prevention and communications.
- **ChangeLab Solutions** | <http://changelabsolutions.org>
ChangeLab Solutions provides community-based solutions for America's most common and preventable diseases like cancer, heart disease, diabetes, obesity and asthma.
- **Mark Fenton** | <http://www.markfenton.com/>
Public health, planning, and transportation consultant who is trying to help America find its way to more active and more livable cities, towns, and neighborhoods.
- **Pew Charitable Trusts** | <http://www.pewtrusts.org>
The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and stimulate civic life.
- **Prevention Institute** | <http://www.preventioninstitute.org>
Prevention Institute trains thousands of professionals and practitioners in cutting-edge prevention research and practice. Presenters are knowledgeable about prevention, particularly in the content areas of health equity and chronic disease prevention.
- **Smart Growth America** | <http://www.smartgrowthamerica.org>
Smart Growth America advocates for people who want to live and work in great neighborhoods. They believe smart growth solutions support businesses and jobs, provide more options for how people get around and make it more affordable to live near work and the grocery store.

Alternatively, consider inviting your local health department director or staff to share their disease prevention and health promotion expertise. Looking for presentations? Visit <http://www.achievecommunities.org/2012resources.cfm> for presentations provided at the 2012 ACHIEVE Coaches Meeting and Action Institute.

Becoming a 501c (3)

A 501(c)(3) organization is a type of nonprofit corporation classified by the IRS as either a “public charity” or a “private foundation. “What distinguishes nonprofits is not whether they can make surplus income, but rather what is done with any “profit.” A for-profit company that generates net revenue can choose to distribute those profits to owners and shareholders, executives, and employees. Nonprofit organizations don't exist to earn money for owners, stakeholders or employees. In fact, distribution of profits is strictly prohibited, and must be used to further the mission of the organization. This distinction, not the ability to generate a profit, is a major difference between nonprofits and businesses. As a result of its qualification as a 501(c)(3) organization, this type of nonprofit is able to receive tax-deductible charitable contributions, and is exempt from business income and property taxes.

13 Steps to starting a 501c3 Non-profit Organization*

- 1. Determine what type of nonprofit organization you are starting by analyzing the primary objective.** It is to support some issue or matter of private interest or public concern such as the arts, charities, education, politics, religion, research, or some other endeavor for non-commercial purposes. There are different legal statuses for nonprofits, one of them being a 501(c)(3), which is exempt from income and (sometimes) property tax, and able to receive tax-deductible charitable contributions. While it can be helpful to consult with an attorney who is experienced in the area of nonprofit law to help avoid mistakes that people sometimes make when they try to incorporate by themselves, many people have been successful establishing a non-profit on their own. For those that are interested in proceeding without an attorney, sources found in books and on the Internet such as Secretary of State web sites may provide the necessary forms and information needed to establish a new non-profit.
- 2. Formulate a mission statement.** As a non-profit organization, you exist to accomplish your mission, which should be crafted based upon your purpose, services and values. The mission statement is a concise expression that covers in one or two sentences who the organization is, what it does, for whom and where. It should also be compelling, as it will be used in all published materials, funding requests and public relations. It should also portray how your organization is distinct from others. (See Tips for sample mission statements.)
- 3. Form a Board of Directors.** Forming a board requires careful thought and extensive recruitment efforts. Each state has regulations that determine the minimum size of the board, typically three, but the optimum number of people who sit on the board should be determined by the needs of the organization. Based on what your organization would like to accomplish, you should decide what special skills and qualities you will require of the individuals on your board. Identify qualified individuals who are supportive of your mission and are willing to give of their talents and time. (See Tips for more information.)

- 4. File Articles of Incorporation.** Articles of Incorporation are official statements of creation of an organization filed with the appropriate state agency. They are important to protect both board and staff from legal liabilities incurred by the organization, making the corporation the holder of debts and liabilities, not the individuals and officers who work for the organization. The specific requirements governing how to incorporate are determined by each state. You can obtain the information you need to proceed with this step from your state Attorney General's office or your state Secretary's office. Before you spend your money, at least consult with an attorney who is experienced in the area of nonprofit law so that you do not make one of the many major mistakes that people make when they try to incorporate by themselves.
- 5. Draft bylaws.** Bylaws are simply the "rules" of how the organization operates. Although bylaws are not required to file for 501(c)(3) status, they will help you in governing your organization. Bylaws should be drafted with the help of an attorney and approved by the board early in the organization's development.
- 6. Develop a budget.** Creating a budget is often one of the most challenging tasks when creating a nonprofit organization. A budget is the expression, in financial terms, of the plan of operation designed to achieve the objectives of an organization. New organizations may start the budgeting process by looking at potential income – figuring out how much money they have to spend.
- 7. Develop a record-keeping system.** Legally, you must save all Board documents including minutes and financial statements. It is necessary to preserve your important corporate documents, including board meeting minutes, bylaws, Articles of Incorporation, financial reports, and other official records. You should contact your appropriate state agency for more information on what records you are required to keep in the official files.
- 8. Develop an accounting system.** If your board does not include someone with a financial or accounting background, it is best to work with an accountant familiar with non-profit organizations. Nonprofits are accountable to the public, their funders, and, in some instances, government granting bodies, and it is vital to establish a system of controls (checks and balances) when establishing the organization's accounting practices. Responsible financial management requires the establishment of an accounting system that meets both current and anticipated needs.
- 9. Apply for a federal employer identification number.** Regardless of whether or not you have employees, nonprofits are required to obtain a federal Employer Identification Number (EIN) — also referred to as the federal ID number. Available from the IRS, this number is used to identify the organization when tax documents are filed and is used not unlike an individual's Social Security number. If you received your number prior to incorporation, you

will need to apply for a new number under the corporate name. Ask for Form SS-4 when applying for your EIN.

- 10. File for 501(c)(3) status.** To apply for recognition of tax-exempt, public charity status, obtain Form 1023 (application) and Publication 557 (detailed instructions) from the local IRS office or the IRS web site. The filing fee depends upon the size of the organization's budget. The application is an important legal document, so it is advisable to seek the assistance of an experienced attorney or certified public accountant when preparing it.
- 11. File for state and local tax exemption.** In accordance with state, county, and municipal law, you may apply for exemption from income, sales, and property taxes. Contact your state Department of Revenue, your county or municipal Department of Revenue, local Departments of Revenue, and county or municipal clerk's offices for information on how to do this in your jurisdictions.
- 12. Fulfill charitable solicitation law requirements.** If your organization's plans include fundraising, be aware that many states and few local jurisdictions regulate organizations that solicit funds within that state, county, or city. Usually compliance involves obtaining a permit or license and then filing an annual report and financial statement. Contact the state Attorney General's office, the state Department of Commerce, state and local Departments of Revenue and county or municipal clerk's offices to get more information.
- 13. Apply for a nonprofit mailing permit.** The federal government provides further subsidies for nonprofits with reduced postage rates on bulk mailings. While first-class postage rates for nonprofits remain the same as those for the for-profit sector, second- and third-class rates are substantially less when nonprofits mail to a large number of addresses. For more information on eligibility, contact the U.S. Postal Service and ask for Publication 417, Nonprofit Standard Mail Eligibility (also available at the link below).

* Taken from <http://www.wikihow.com/Start-a-501c3-Nonprofit-Organization>

National Partners

National Association of County and City Health Officials

Laura Horne, MPH, CHES

Senior Analyst, ACHIEVE

National Association of County and City Health Officials

1100 17th St NW, Seventh Floor

Washington, DC 20036

Phone: 202-507-4237

Fax: 202-783-1583

lhorne@naccho.org

info@achievecommunities.org

NACCHO Information:

Main Line: 202-783-5550

www.naccho.org

[Facebook](#) | [Twitter](#)

[NACCHO's Chronic Disease E-Newsletter](#)

National Recreation and Park Association

Zarnaaz Bashir, MPH

Director, Health Initiatives

National Recreation and Park Association

22377 Belmont Ridge Road

Ashburn, VA 20148

703-858-4746 (direct)

703-999-8684 (cell)

703-729-4753 (fax)

zbashir@nrpa.org

National Association of Chronic Disease Directors

2872 Woodcock Blvd, Suite 220

Atlanta GA 30341

United States of America

(770) 458-7400

Society for Public Health Education

10 G Street NE Suite 605

Washington DC 20002

Phone: 202-408-9804

www.sophe.org

[Facebook](#)|[Twitter](#)

[SOPHE News U can Use](#)

YUSA

Bruce E Hathaway, Project Manager

Healthier Communities Initiative

YMCA of the USA

1129 20th Street NW, Suite 301

Washington, DC 20036

(C) 312-909-1602

(E) bruce.hathaway@ymca.net

(W) www.ymca.net

ACHIEVE ACTION INSTITUTE **SAMPLE AGENDA**

Desired Outcomes

- Gain clarity on the ACHIEVE goals, process and expectations.
- Increase knowledge of how policy, systems and environmental change strategies help shape and sustain healthy behaviors.
- Explore specific policy/environmental change strategies for increasing physical activity and healthy eating, preventing tobacco use, and managing and preventing chronic disease.
- Develop skills and gain tools for implementing, influencing, and sustaining policy-focused initiatives—by sector and at the community-wide level
- Learn how to maximize the use of data, including the CHANGE assessment tool, to support your efforts.
- Advance your team’s (CHART’s) collective thinking about the overall vision, initial priorities and next steps for developing an effective community action plan (CAP).

Day One

Preconference Meeting(s)

- Coaches
- **Provide an opportunity for ACHIEVE coaches to discuss roles, expectations and answer questions about activities for the next __ days. Set coaches up to effectively run team time session, including tips and techniques for facilitating these sessions & building stronger sense of team.**
- Some discussion around the concept of “facilitated leadership” and what that means for the coaches.

Welcome & Opening Remarks

Opening Keynote: *Why Are We Doing This Work?*

Proposed Presenter:

Team Time #1: Setting the Table

1. What about this initiative is most compelling to you personally?
2. What do we want to make sure our team explores and/or gets out of this gathering?

Adjourn

Day 2

Welcome

- Suggestion: Purpose
- Suggestion: That’s Me!
- Suggestion: First Lady DVD
-

ACHIEVE Calls for Fresh and Proven Approaches

- Speaker:

- Presentation framing the burden of chronic disease; the rationale for the policy, systems, and environmental change approach and why it is the focus of ACHIEVE; and the importance of addressing health equity.

Stories from the Field: Making a Difference

- 2-3 mentors sharing how their ACHIEVE experiences have made a difference in their communities
- Highlighting specific strategies/accomplishments/progress
- Panel format:
 - ↳ *Moderator:*
 - ↳ Identified Speakers:

Break

- *Suggestion: Physical activity for first ~10 minutes*
 - *Lead: Suggestion: Beyonce' Video*

Keynote: Health Equity

- *Speaker:*
- Session Description:
- Introduction:

Team Time #2—Vision and Legacy

- Facilitator:
 1. *Suggestion: What did you hear from this morning's speakers that you found most relevant to your local community landscape?*
 2. *Suggestion: What Legacy should we be aiming for through ACHIEVE? (What contributions, results or impacts will make this worthy of our collective time and effort?)*

Lunch

Building a Legacy of Active Living Communities

- *Speaker: someone who speaks about the built environment*
- *Session Description: _____ will provide an engaging and thought provoking look at the real epidemics that are threatening America's health and well-being. This session will include practical ideas on overcoming the stickiness problem with physical infrastructure and policy approaches to create healthy habits through the routines of daily life.*

Stories from the Field – Active Living Communities

- 1-3 coaches/partners sharing their ACHIEVE experiences
- Highlighting specific strategies/accomplishments/progress for changes in built environment or elsewhere that has increased opportunities for active living
- moderated interview format
 - ↳ *Moderator:*
 - ↳ Identified Speakers:

Break

Building A Legacy of Healthy Eating Communities

- *Presenter:*

- Session Description: How home environments, communities, and school landscapes shape our eating attitudes and behaviors; innovative and effective strategies for creating healthier food environments/options; access and disparity issues.

Stories from the Field – Healthy Eating Communities

- 1-3 mentors sharing their ACHIEVE experiences
- Highlighting specific strategies/accomplishments/progress for changes that have increased opportunities for healthy eating
- moderated interview format
- ↳ Moderator:
- ↳ Speakers:

Adjourn

Walk Audit : (have someone available to do a walking audit of the community)

Day Three

Suggestion: Walk Audit (before day starts ...if there are enough people for two time slots.)

Welcome Back

- review where we have been and where we are going; remind folks of recommendation to divide team up among workshops and breakouts
- Thought of the Day
- Morning Stretch

Building a Legacy of Tobacco Free Communities

- Speaker:
- Focus on
 - Where have we been having success
 - What is the work left to be done (i.e., where do we still see steady or increasing rates if use and/or exposure); health disparity lens
 - Some interesting/innovative approaches

Stories from the Field – Tobacco Free Communities

- 1-3 mentors sharing their ACHIEVE experiences
- Highlighting specific strategies/accomplishments/progress for changes that have increased opportunities for tobacco-free environments
- moderated interview format
 - ↳ Moderator:
 - ↳ Speakers:

Break

Introducing CHANGE (Community Health Assessment and Group Evaluation)

- Speaker:
- Desired Outcome: Learn how to maximize the use of data, including the CHANGE assessment tool, to support your efforts.

- Session Description: This presentation will help CHARTs become oriented with the CHANGE tool and highlight how CHANGE data can assist with developing a community action plan (CAP) and monitoring ACHIEVE activities across the project period.

Stories from the Field: Getting to Success

- 1-3 mentors sharing their ACHIEVE experiences
- Highlighting the “process elements” contributing to success; e.g.,
 - ways in which they were able to come together as a team and use the diverse talents of the CHART
 - using CHANGE and other data to inform decisions and/or make the case for their efforts
 - reaching out to and engaging “unusual suspects” in the process
 - etc.
- moderated interview format
 - ↳ Moderator:
 - ↳ Speakers:

Lunch

Suggestion: Open Space (this could be a lunch and team time activity)

- *introduce open space process at beginning;*
- *Need Table Tents for Topics*
- *Need topics:*
 - *Pull topics from the agenda*

OR

Session Description: Select tables will feature topics of interest that participants can informally discuss with each other.

Workshops (1-2 hour sessions concurrent with breakout sessions)

Desired Outcomes: (1) Explore specific policy/environmental change strategies for increasing physical activity and healthy eating, preventing tobacco use, and managing and preventing chronic disease. (2) Develop skills and gain tools for implementing, influencing, and sustaining policy-focused initiatives—by sector and at the community-wide level. **(All Workshop Titles are Suggestions)**

A. Workshop #1: CHANGE – Using Data Strategically

Speakers:

Session Description: This session will be a hands-on training on the CHANGE tool and utility of the CHANGE Action Guide. Participants will review the CHANGE tool completion process and learn how to use CHANGE data to guide CHART dialogue and priority selection for the development of the Community Action Plan (CAP). A CHANGE tool demonstration will be provided to walk participants through a process for reviewing, organizing, and using CHANGE data to create a CAP.

B. Workshop #2: Making the Case – Capturing and Telling Our Stories

Proposed Speaker:

Breakout Sessions (55 minute sessions concurrent w/workshops; repeated)

Desired Outcomes: (1) Explore specific policy and environmental change strategies for increasing physical activity and healthy eating, preventing tobacco use, and managing and preventing chronic disease. (2) Develop skills and gain tools for implementing, influencing, and sustaining policy-focused initiatives—by sector and at the community-wide level.

A. Physical Activity

- Session Leads/Facilitators:
- Speakers: mentors

B. Nutrition

- Facilitator:
- Mentor Speakers:
- Session Description: Access to low-cost, fresh fruits and vegetables is a cornerstone to achieving a healthy community. Learn the latest evidence-based policies in community nutrition, and also hear from experienced mentors about successful population-based changes in their communities.

C. Tobacco

- Session Leads/Facilitators:
- Speakers:
 - Session Description: Learn the latest national strategies related to tobacco prevention, and local examples for reducing and eliminating tobacco use in CDC-funded communities. Local coaches and experts will share experience and approaches related to tobacco prevention via local ordinances, marketing strategies, youth prevention efforts, restricting access and creating normative changes.

D. Chronic Disease Management/Systems Change

- Session Leads/Facilitators:
- Speakers:

E. Effective Mentoring

- This session is a skill-building session for ACHIEVE Mentor Communities, designed to build their capacity to serve as mentors to New Communities. Mentors will engage in activities to enhance their ability to create balance in the mentor/mentee relationship through facilitated leadership and effective listening and other skills to be identified by national partners.
- Speakers:

Breakout Sessions (*55 minutes sessions concurrent w/workshops*)

- Repeat of previous sessions

Break (No Physical Activity)

Team Time #3: Starting Points

1. What were some of the most significant ideas or insights you would like to explore further from the breakout and plenary speakers?
2. Given what you have heard so far, what are some possible starting points (issues, existing initiatives, strategies) for our initiative? Where could we begin to focus our efforts?

Wrap Up

Day 4

Welcome Back

Keynote – Principle Driven Leadership

- Proposed Presenter:
- Description: This session will describe “third-circle” leadership, highlighting the unique nature of this approach and exploring why it is the only form of leadership capable of advancing lasting change for the common good.

Team Time #4

1. Looking ahead, what will be some of the keys for our ACHIEVE efforts to be effective and successful?
2. Review and check for rough consensus on....
 - Emerging Vision: How will your community different (results & for whom)?
 - Most promising Starting Points?
 - Keys for working together & making this work in our community?
 - Next Steps (90 days)?

Technical Assistance Tools and Resources

- Speaker:
- Session Description: This session will describe current and future technical assistance tools and resources that are available to support CHARTs as they begin to implement policy, systems, and environmental changes.

Wrap-Up and Adjourn/Completion of Action Institute Evaluation Forms

By Maggie Cooper

Walk this Way

PEOPLE HAVE A TENDENCY to see only aspects of their community that affect them personally. A parent views the busy street near a park as a safety threat to his or her kids—while the driver in a hurry accelerates to the 45 MPH speed limit without even noticing the park. A public works manager sees a sidewalk and judges it to be in good condition; at the same time the parks director wishes that sidewalk connected to the park, and the transportation director notices that the sidewalk isn't wide enough to meet ADA standards. Despite the different elements people value in the same community, all of want access to safe, friendly, and active environments. All too often, though, instead of coming together to create the best possible version of their community, citizens notice only what is specifically interesting to them.

A fantastic way to allow people to see the potential their community has is by doing a walking audit. A walking audit (also referred to as a walking assessment) is a "review of walking conditions along specified streets conducted with a diverse group of community members" (www.walkablecommunities.org). Depending on the size of a community, the audit may consist of one 90-minute walk or several excursions over a few weeks. The leader does not have to be a walking audit expert, although he or she should have an understanding of basic urban planning principles and complete streets. It is best to limit the walk to 30 people or fewer. Because of this limit, many communities decide to offer numerous walks in an effort to collect input from as many people as possible.

Before you start a walking audit, you will need to set one major ground rule: During this walk, all opinions are equal. Once everyone has agreed to value each other's thoughts and comments, outline the basic environmental details they should be focusing on. Examples could include sidewalk width and condition, street crossings, connectivity, parking, overall feel

of the street, building placement, and zoning type. Stop frequently and ask for opinions on what you just saw. Have participants rate each block (1=bad, 5=perfect) and comment on what they noticed and how they felt while walking.

Also, ask some participants to pretend to be someone other than themselves. You can, for example, ask the mayor to focus on issues the public works director would be likely to notice. Ask your police chief to push a baby stroller and point out issues that might concern a mother walking with several children. Have your transportation engineer consider aesthetics, while asking your planning commissioner to make note of street and sidewalk widths. Ask the most physically active



When residents look at their surroundings through someone else's eyes, they will see aspects of their community that they have probably never noticed before.

person to do portions of the audit in a wheelchair. When residents look at their surroundings through someone else's eyes, they will see aspects of their community that they have probably never noticed before.

While it is important to include your high-level decision-makers in your audits, don't leave out less obvious groups of people. A local Girl Scout troop in Hernando, Mississippi, did a walking audit of downtown sidewalks for a community service project. They produced a detailed GIS map based on their findings, which they presented to the Board of Alderman the night the sidewalk budget was on the agenda. Later that night, the board approved \$100,000 for sidewalk repairs.

Every community will notice different things on their walk, but the most common problems tend to be crumbling sidewalks,



lack of curb-cuts, too narrow sidewalks, no safe street crossing opportunities, uninviting street front buildings, lack of safe biking areas, and poor connectivity. While conducting an audit in his town, Drew Burns, Deputy Director of Parks and Recreation in Van Buren, Michigan, was thrilled to see a large number of people running, walking, and biking around town. What disturbed him, though, was that the majority of these people had to switch frequently from the sidewalks to roads and then back to sidewalks. "Connectivity is a huge issue here. Most developments put in great sidewalks, but there aren't any means to walk from one development to the next."

Remember that this is also an opportunity to notice good things about your community. Take note of where the environment is safe for walking. Point out the streets where the tree canopy is plentiful and where the surroundings invite people out of their cars and onto the sidewalks. Notice businesses that have inviting storefronts and restaurants that have outdoor tables. Thank the pedestrians and bicyclists who are safely using the pathways. By recognizing the positive attributes of your community, participants will take pride in where they live, which often results in their getting involved in improving their surroundings.

Lastly, be sure to make the walking audit fun. The person leading the walk must be energetic, outgoing, and *loud*. Incorporate fun facts about your community into the walk by inviting a local historian to participate. If children are on the walk, invite them to voice their opinions. Hand out disposable cameras to participants who do not have camera phones, and encourage people to take pictures of everything they like or want to change. Start and end the walk in a local park, perhaps on a day when you have a farmers market, summer camp, or local festival going on in the park.

So now that you know the basics, start planning your walking audit. You will make new friends, see your neighborhood in a new way, strengthen relationships with city officials, and figure out ways to get more people active throughout the community.

If you are interested in bringing a walking audit professional to your community, please visit www.Walklive.org or www.markfenton.com. For more information about walking audits and making your community more walkable, please visit: www.americawalks.org; www.saferoutesinfo.org; www.walkscore.com; www.pedbikeinfo.org; www.activelivingresearch.org; www.walkable.org.

MAGGIE COOPER is NRPA Health and Wellness Program Manager.



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