

APPENDIX 1

COMPREHENSIVE PROGRAM PLANNING WORKSHEETS

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COMPREHENSIVE HEART HEALTH PROGRAM PLANNING WORKSHEETS

Step 1 – Taking Stock

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- 1-2 Internal Assessment – Review of original goals
- 1-3 Internal Assessment – Review of audience and approach
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- 1-5 External Assessment - PEST and SWOT analysis
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- 1-7 Scanning summary

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- 5-3 Creating program outcomes and process indicators
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- 5-5 Comprehensive Summary Logic Model

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 1 WORKSHEET 1-1 Internal Assessment – Stakeholders

List of current stakeholders	Mandates	Willing to continue?
Who are the members in this heart health coalition?	How does their mandate & mission compliment your work?	
Who else has a mandate to work in this area?		
Are there existing programs in the community that complement the project goals?		

Adapted from a worksheet developed by The Health Communication Unit

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 1 WORKSHEET 1-2 Internal Assessment – Review of original goals

List original goals.	Do you still want to pursue this goal?	How have you moved toward achieving this goal?

Adapted from a worksheet developed by The Health Communication Unit

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 1 WORKSHEET 1-4 Internal Assessment – Review of original programs

List program activities that worked well	List program activities that did not work as planned.
What program activities would you stop, or do differently?	What program activities would you expand or extend to new audiences or channels?

Adapted from a worksheet developed by The Health Communication Unit

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 1 WORKSHEET 1-3 Internal Assessment – Review of audience and approach

Identify original audiences	Are these still the key groups?	Are you reaching them?	Other possible channels
Approaches Used	Other possible approaches	Existing opportunities	

Adapted from a worksheet developed by The Health Communication Unit

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 1 WORKSHEET 1-5 External Assessment – PEST and SWOT analysis

A PEST Analysis

Examine the political, economic, social and technical factors and trends which may affect your potential project.

B SWOT Analysis

What are the strengths, weaknesses, opportunities and threats to your organization and your community in relation to your project?

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 1 WORKSHEET 1-7 Scanning summary

Enabling Factors	Limiting Factors	What will it take you to go forward?
Based on the information from the internal & external assessments, what factors will help your project?	Based on the information from the internal & external assessments, what factors will hinder or limit your project?	

Adapted from a worksheet developed by The Health Communication Unit

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 1

WORKSHEET 1-6

Research

a) Examine available information from the literature. What does it say about similar types of projects and how they should be designed? List the theories and factors relevant to your audience, paying particular attention to including the broad determinants of health and conditions for health.

b) What do previous evaluations say about what works and doesn't work in relation to your audience and topics?

c) List the needs of your community in relation to heart health based on demographic and health status information. Involve others in interpreting the data and identifying needs.

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 2 WORKSHEET 2-1 Goals

MISSION STATEMENT

A. Goals of the Project: State in concrete positive terms, usually aimed at everyone in the population, what the project will accomplish.

B. Program Goals: State in concrete positive terms what outcomes will be accomplished to achieve the project goals. *(to increase, to decrease)*

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 2 WORKSHEET 2-2

Goals: Identify Audiences, Develop Objectives and Indicators

C. Audiences

Review the program goals and the data and research you have done for your community. Which groups of people require attention in order to achieve each goal?

Program Goal

Audiences

Attention Needed

Possible Channels

D. & E. Objectives and potential indicators

Develop objectives for each client group which address the specific needs identified above.

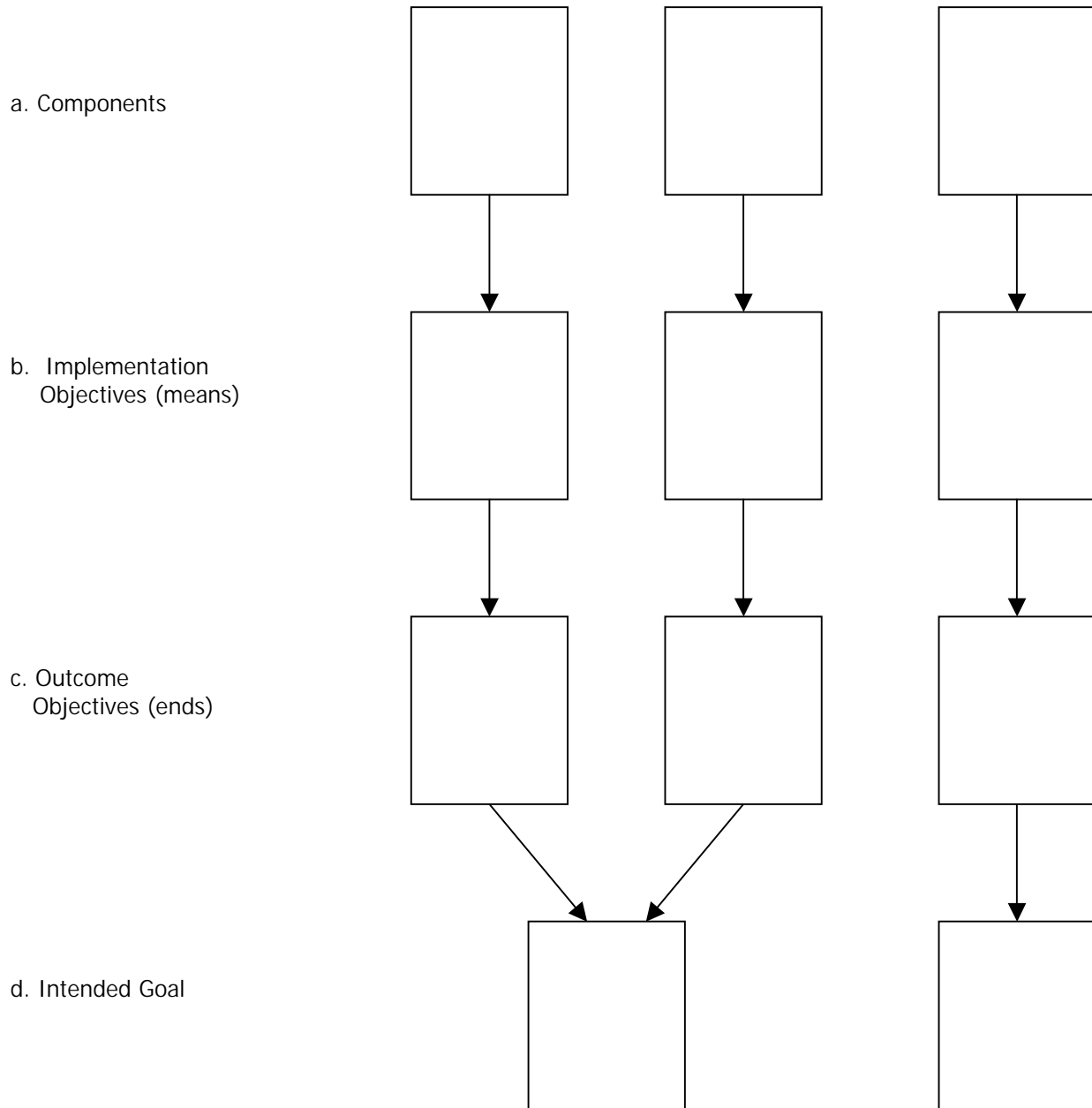
Then, identify how you would know this objective was achieved - sketch out some potential indicators for each objective.

Objective

Potential indicators

Adapted from a worksheet developed by The Health Communication Unit
COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 3 WORKSHEET 2-3 BASIC PROGRAM LOGIC MODEL



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STEP 3

WORKSHEET 3-1 Audience Analysis

Demographics

What is the gender breakdown of your audience and/ or audience segments?

What are the ranges of ages?

What are the most typical or representative occupations - professional, white collar, blue collar, skilled or unskilled?

What is the income range of your audience? What is the average?

What is the range of formal education among your audience? What is most common?

What is their family situation - for example are they two parents with children, single parents or single persons?

Where do they live and work - in urban, rural, suburban settings?

What are some of the cultural characteristics? Is the audience culturally diverse?

Behavioral

What is their actual current behavior? Provide a detailed picture of the behaviors in question (e.g., smoking, dietary fat intake, exercise, etc.).

What benefits are derived from their current behavior?

What is their readiness for change? What would the audience members give up to make the change?

What would they gain?

What social or medical consequences are your audience members experiencing already?

What might they be vulnerable to, based on family history and patterns in the community?

Psychographic

What are the fundamental values and beliefs among your audience? What is most important to them?

What are some of their key personal characteristics?

Where do they get their health-related information? Which media, interpersonal channels, and events are they exposed to?

What organizations and social networks do they belong to?

How do they spend their time and dollars? What are they interested in? Describe their lifestyle.

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 3 WORKSHEET 3-2 Assessing Individual Programs

- | | | | | |
|--|---------|--------------|--------------|--------|
| 1. Is it wanted by our client group?
] | Yes [] | Somewhat [] | No [] | |
| 2. Is it needed by our client group?
] | Yes [] | Somewhat [] | No [] | |
| 3. Does it fit with the mission and goals of our
] coalition? | | Yes [] | Somewhat [] | No [] |
| 4. Does it duplicate an existing community program?
] | Yes [] | Somewhat [] | No [] | |
| 5. Does it support other heart health programming?
] | Yes [] | Somewhat [] | No [] | |
| 6. Would other organizations be willing to co-sponsor?
] | Yes [] | Somewhat [] | No [] | |
| 7. Can this program be accomplished in the given
] time period? | Yes [] | Somewhat [] | No [] | |
| 8. Can it be accomplished with the given budget?
] | Yes [] | Somewhat [] | No [] | |
| 9. Does it have potential to be incorporated into
] the community and be sustained? | Yes [] | Somewhat [] | No [] | |
| 10. Does it operationalize our guiding principles? | Yes [] | Somewhat [] | No [] | |
| 11. Do we have the expertise, or access to expertise,
] to develop and implement? | Yes [] | Somewhat [] | No [] | |
| 12. Has it been proven effective elsewhere?
] | Yes [] | Somewhat [] | No [] | |
| 13. Can it be evaluated?
] | Yes [] | Somewhat [] | No [] | |

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 3 WORKSHEET 3-3 Reviewing a Package of Programs

Review your package of proposed programs. Rate how well your package of proposed programs accomplishes each of the following criteria.

- | | |
|---|----------------------------|
| 1. Are programs sequenced – some early programs to raise awareness but with a potential to be extended to other approaches? | Good [] Fair [] Poor [] |
| 2. Is there synergy between programs? Do they compliment each other? | Good [] Fair [] Poor [] |
| 3. Are there ways resources can support multiple programs? | Good [] Fair [] Poor [] |
| 4. Are there ways resources can be used for multiple audiences? | Good [] Fair [] Poor [] |
| 5. Can programs be adapted to address specific local needs and audiences? | Good [] Fair [] Poor [] |
| 6. Are there programs with built in sustainability? | Good [] Fair [] Poor [] |
| 7. Overall are your programs comprehensive? (balance of risk factors, channels and approaches) | Good [] Fair [] Poor [] |
| 8. Are there sufficient resources (time, people and money) to carry out this package of programs? | Good [] Fair [] Poor [] |
| 9. Will this package of programs achieve the project goals? | Good [] Fair [] Poor [] |

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 4 WORKSHEET 4-2 Action Planning

Goal: _____

Objectives _____

List strategies	List specific Actions needed	Who's Responsible	Resources Needed	Date Due

Adapted from a worksheet developed by The Health Communication Unit

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 4 WORKSHEET 4-1 Work Group Checklist

The purpose of this worksheet is to help a group become clearer about its role, responsibilities and way of working together. The following questions are developed for work group discussion.

1. Why are we meeting? What is our goal and task?

2. How important is our goal to each member?
 [] very important [] important [] not important

3. How frequently will we meet?

4. How long will our meetings last?

5. How can we break down the workload - who will do what?

6. How will we keep everyone informed about what we've done?

7. Who will coordinate the activities of this group? (Call meetings, write minutes, report to coalition...)

8. How will we deal with conflict if it arises?

9. What does everyone want to get out of this experience or accomplish?

10. When will we revisit this checklist?

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 4 WORKSHEET 4-3 Resources Review

Program Title	Audience
Objectives	
Up to date and effective resources currently available for this program	
Resources that are OK for now but need review in the future	
Resources that need to be dropped	

Adapted from a worksheet developed by The Health Communication Unit

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 4 WORKSHEET 4-4 Implementation Checklist

The following questions provide a check on various parts of implementation. Review each set of questions to determine if there are gaps in your implementation strategy.

Why

1. Why are we doing this program?
2. In what ways does this support the long-term outcomes?
3. In what ways does this support our partners' missions?
4. Why will people come to our program/event? What's in it for them? (Fun, prizes, needs met etc.)

Who

5. Review audience analysis: Are we reaching who we want to reach?
6. Does anything further need to be done to reach this group?
7. Is appropriate language used in materials for the key group?
8. Are decision-makers or gate-keepers informed and supportive?
9. Have members of the client group been involved in planning or design?
10. Who will communicate the success of this event (e.g. is media invited?)
11. Who will document what works and what doesn't work?

What

12. Is the work plan complete with all elements filled in so clear direction is evident? Are any steps missing?
13. Is the program/initiative clear to all involved?
14. Has adequate training occurred or been planned?
15. Are adequate supports in place e.g. Are your materials ready? Do you have adequate space?
16. What is the worse case scenario - how can we plan to avoid it?

When

17. Is the timing realistic?
18. How does the timing of the event or process work to support implementation?
19. What other things might interfere with planned timing?
20. What disadvantages have been taken into consideration? (E.g., Other competing events)
21. If outdoor space is needed, what is the likelihood of the weather cooperating or how will you deal with it?
22. How does the time of day fit with our clients' schedules?

How

23. How will your audience be affected by this program?
24. Has adequate promotion taken place? Will our client group come?
25. Has promotion used effective methods with consistent language?
26. Can this event/experience be linked with other community initiatives - piggy backing on other activities?
27. How will we celebrate success?
28. How can media coverage be generated through this activity?
29. How will sustainability of the program be addressed?

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 5 Worksheet 5-1 Evaluation: Identification of stakeholders, concerns and evaluation questions

<p>Stakeholders: List those individuals and organizations with a stake in this heart health project</p> <ol style="list-style-type: none">1.2.3.4.5.6.7.8.9.10.	<p>Stakeholders Concerns What are the issues or concerns each stakeholder has about the project? (e.g., financial, accountability, cost-effectiveness, etc.)</p>
<p>Purpose of Evaluation Looking at the list of concerns and who has the greatest stake in the evaluation, list the purpose of the evaluation.</p>	<p>Evaluation Questions From the evaluation purpose, list possible evaluation questions.</p>

Adapted from a worksheet developed by The Health Communication Unit

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 5 WORKSHEET 5-2 Creating measurable outcome objectives and indicators

<p>Short-term outcomes State the short term results you can expect at the end of the program. State in a concrete measurable form.</p>	<p>Short term outcome indicators What are the directly observable or reportable results you can measure related to the achievement of the outcomes? What are reasonable indicators of these results related to the evaluation questions?</p>

Adapted from a worksheet developed by The Health Communication Unit

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 5 WORKSHEET 5-3 Creating measurable process objectives and indicators

Program Activities What activities are you planning to reach the program outcomes?	Process Indicators How will you know the program has been delivered as desired? (who was reached, how many, etc.)

Adapted from a worksheet developed by The Health Communication Unit

COMPREHENSIVE HEART HEALTH PROGRAM PLANNING

STEP 5 WORKSHEET 5-4 Summary Evaluation Form

Program Objectives Strategy	Evaluation Questions	Indicators	Data Collection

Used with permission Virgo Planning and Evaluation Consultants

Comprehensive Heart Health Planning Logic Model

(1997 OPHA Conference)

