THE

Community Action Model

TOOLKIT

How to Use the interactive PDF

This document is interactive. Each page is equipped with buttons and navigation to help you to easily find the sections and chapters you need.

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Interactivity

All forms may be completed digitally, or printed and completed by hand. Each page contains bookmarks to jump to key sections in the toolkit, or to email for support.

Navigation

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I. The Community Action Model (CAM) Toolkit

How to Engage Communities to take Actions that Benefit Public Health

What is CAM? For more than two decades, the San Francisco Tobacco-Free Project has successfully funded and guided Community-Based Organizations to address a variety of policy, systems, and environmental public health factors affecting their neighborhoods: this proven method is called the Community Action Model (CAM). CAM creates change by building community capacity through a five-step policy development process. It includes guiding community members to conduct their own research, and has resulted in many innovative and exciting policies. This tool-kit will help you implement the Community Action Model in your community.

Who is this training for? Within the Community Action Model program, there are three main partners: (1) the Funding Agency, (2) the Community-Based Organization (CBO) Project Coordinator, and (3) the Emerging Community Leaders (ECLs). A Funding Agency would use this toolkit to guide the CBO Project Coordinators and ECLs on how to create a specific public health policy, system or environmental change in their communities.

Preface

It is Guadalajara, Mexico, mid 1980's. A group of public health students work with community members to find out why so many of their children suffered gastro-intestinal illnesses. While this type of work is common, their methods to address the issues were unique. Students partnered with and trained community members who then led the project activities: they came up with key questions, developed a non-text picture-based survey and conducted a survey. They gathered and analyzed their findings and learned to approach city hall with environmental solutions. Their efforts resulted in paved roads, potable water and eventually a community center.

This grassroots public health work was based on ideas found in Popular Education and Paulo Freire's work[1.] Main concepts included: start with peoples' experience, actively grow their leadership skills, place the community at the heart of the public health process, and address inequities in policies, systems and the environment (PSE) that affect their health choices.

Today, public health research and practice points to health equity as a major contributor to public health outcomes in the United States. But, in the late 80's and early 90's, public health work and its related funding guidelines primarily focused on individual behavior change interventions. While many grassroots public health staff suspected that environmental factors, such as access to adequate housing and healthy food, tobacco industry promotions, had the greatest impact on community wellbeing, their efforts were tied to funding and work plan guidelines that restricted their efforts to behavior change activities. As the old adage states, **"do you give a person a fish or teach them to fish for the rest of their lives?"** Activists then followed up with **"and make sure there's fish in the lake."**

1 Many of the ideas involved in community diagnosis have their roots in popular education approaches and models that continue to evolve in Africa, Latin America, and other parts of the Global South (4: Minkler and Wallerstein 2003, 9). This work was greatly influenced by Paulo Freire, and Fals-Borda in Latin America (4: Minkler and Wallerstein 2003, 30-31) and Miles Horton of the Highlander Institute and Kurt Lewin in the U.S. (4: Minkler and Wallerstein 2003, 29-31).

As stated in the introduction of the Community Action Model (CAM):
"No discussion of improving people's health and well-being can be made without looking at health and social inequities in the context of the systems and policies that create them. No solution to dismantle these inequities can be made without the full involvement and leadership of those communities impacted most by the social and economic injustice that these promote."

Back in the San Francisco Bay Area, we realized that so much of public health is really health equity work. At La Clinica De La Raza, in Oakland, California, we began adapting the observed concepts to address tobacco advertising and lack of access to fresh produce. Later, at the San Francisco Department of Public Health, we developed the 5 steps of the CAM, a process whereby the people affected by health inequities acquire the skills to choose the issue, research it, and work towards PSE.

For more than two decades, we worked with Community-Based Organizations (CBOs) and evolved the CAM by developing tools to implement and evaluate each of the model steps. We addressed challenges such as exploring how to operationalize PSE change in the US public health context. We applied the phrase, "**Se hace el camino al andar."** ("You make the road by walking it.") to capture the organic process at the heart of the CAM: We designed the curriculum and administrative tools to guide funded CBOs as stewards of skill development. We defined the criteria to choose CBOs best suited to guide the CAM process. We even published a paper on our work[2]! These efforts resulted in numerous far-reaching PSE changes, from a Healthy Retail program that has increased access to fresh healthy foods[3]

2 Hennessey Lavery, S, et al (April 2005) The Community Action Model: A Community - Driven Model Designed to Address Disparities in Health, American Journal of Public Health, Vol 95, No. 4, 611-616

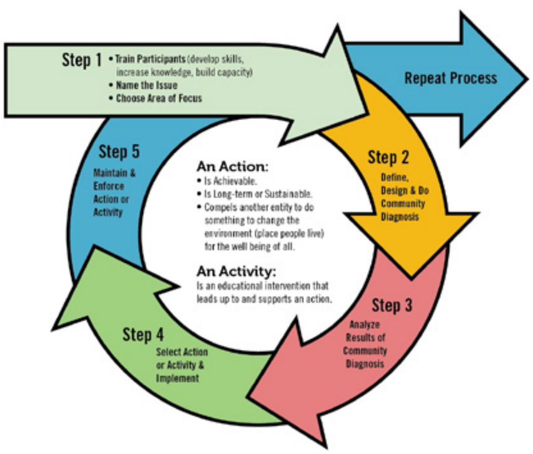
3 HRSF stores with full data from baseline through the first 12 months of follow-up showed a 35% increase in produce units sold.2 Tobacco units sold decreased by an average of 35% in three of these stores, with the fourth seeing no change in the percentage of sales from tobacco but an in- crease in absolute units sold. (AJPH 2019, Minkler) and decreases alcohol, tobacco and junk food influences in small low-income corner stores, to a citywide ordinance that permanently decreases tobacco retailer permits over time, to requiring landlords to disclose where smoking is allowed in a unit.

It is exciting that the CAM continues to evolve as community members, CBOs and public health practitioners apply tools, problem solve and suggest new strategies. This effort to involve other health departments and public health agencies will greatly enhance this process and strengthen our collective work towards public health equity.

Susana Hennessey-Lavery, MPH
Co-Founder of the Community Action Model with
Mele Lau Smith and many others.

Introduction:
Why choose the Community Action Model?

There are various models for developing and building capacity of community, as there are countless mechanisms for releasing funds to non-profit groups. Similarly, several methods of engaging community in research projects are well-documented and utilized in academia. Meanwhile, community organizing models are as plentiful as political campaigns. The Community Action Model (CAM) blends and operationalizes all of these methods with the goal of partnering with community leaders towards a Policy-System-Environmental (PSE) change solution to improve health by addressing health inequities.



No discussion of improving people's health and well-being can be made without looking at health and social inequities in the context of the systems and policies that create them. No solution to dismantle these inequities can be made without the full involvement and leadership of those communities impacted most by the social and economic injustice that these promote.

The Community Action Model builds the strength of future leaders while also working actively to change the health-related policies and systems that we operate within. CAM was developed to draw out and apply the skills of community leaders and encourage their growth in new areas through experiential learning and training. All the while building a team and strategies to affect health-promoting change in the community that is lasting through updates to policies, systems, and environments. CAM fosters the leadership of communities most impacted by social and economic injustices that result into health inequities.

The 5-steps of the CAM build upon community leadership by first raising critical consciousness of community members of the social determinants of health, collecting data to analyze the problem and weigh potential solutions, and finally utilizing and building their power towards a sustainable Policy-System-Environmental change. Through CAM, adult and youth community members develop skills that can be translated to their work on addressing other community issues, such as conducting surveys, building support on an issue, recognizing power structures and learning how to leverage them, media advocacy, and engaging decision-makers. Just as the policy-systems-environmental changes that result from these projects are long-lasting, the investment in people to build new skills and foster existing strengths will serve CAM participants throughout their lifetime.

The Community Action Model is also a learning and teaching model for the San Francisco Department of Public Health and any other agency that adopts it as a guiding principle for funding and partnering. CAM allows our agency to both disseminate funds to community groups, build future "change agent" leaders, teach valuable community assessment and policy thinking, learn from the expertise of people who live in community, and continually improve and add to the model. As we have walked on this road of CAM, we have gained values which we hope will resonate with others considering utilizing the CAM model:

- **Building a better funding partnership model.** CAM is less about funding solely a quantifiable outcome and more about stewardship of a process that evaluates skill building, community strengthening and the funded agency's capacity to implement PSE campaigns. Rather than simply giving out funds and anticipating a final annual report, as some foundations and governments do, CAM allows the Funding Agency to complement and walk alongside the funded community agency during the workplan implementation with specific deliverables, timelines and regular meetings that bring Project Coordinators together to compare notes, problem solve and share successes. CAM also builds the skills of the funded community agency to act as stewards of community leadership development.

- **We are all learners.** CAM is founded upon Popular Education where every person is both a teacher and a learner, realizing that the full potential of everyone can be reached with support and partnership. Not only are the community leaders and Community-Based Organizations learners, but also teachers. In this model, Funding Agencies resume a posture of humility and learning, acknowledging that we are not the only experts in the room.


CAM Emerging Community Leaders

- **Going further for Health Equity.** CAM seeks to address a health issue by supporting the leadership of community members most impacted by it. The purpose of each CAM step is grounding the issue in the context and leadership of the community, rather than just the perceptions and "best practices" of the "public health experts." Community-led and -based data informs any proposed Policy-System-Environmental change solution. Community members build power through educating and informing stakeholders about their solutions, and also gaining the agency and confidence to apply their skills for future social action. We hope that all CAM alumni become future movers and shakers that continue the work in health equity in one shape or another.
- **Truly taking the time.** We didn't get ourselves into a state of deep health inequity and skewed distribution of power overnight, and similarly it takes a true investment of time, people power, and partnership to build strong and lasting solutions to the issues that most affect community.

Together, we can achieve things that would be simply impossible for one agency or one person to tackle. CAM has shown this year after year, as the model nears 25 years of engaging 76 community grantees. CAM proves itself to be much greater than the sum of its parts — a valued partnership is developed when community agencies, Project Coordinators, and community members join the San Francisco Department of Public Health in a shared goal. We invite you to explore the Community Action Model and welcome you on our collaborative journey to change the world one step at a time.

—The Staff at the San Francisco Tobacco-Free Project

Community Action Model

Case Study Snapshots

These case study snapshots highlight and provide a preview of some organizations that have successfully implemented Policy, System and Environment (PSE) actions utilizing the Community Action Model.

Breathe California: Project E-Nuff's No More Flavors (2015–2016)
Breathe California collected data and built community support for a San Francisco policy to end the sale of menthol and flavored tobacco products.

Literacy for Environmental Justice:
The Good Neighbor Program (2003–2004)
Literacy for Environmental Justice worked with non-profits, local community based organizations, and city agencies to create the Good Neighbor Program. The Good Neighbor Program encouraged merchants to reduce tobacco advertising and sales and sell healthier food in exchange for city-sponsored incentives, including infrastructure improvements, store branding, free advertising, and cooperative buying opportunities.

San Francisco Apartment Association and Dolores Street Community Services: Clear the Air Before You Rent (2012–2013)
San Francisco Apartment Association and Dolores Street Community Services worked to develop a tobacco smoke disclosure policy for multi-unit housing in San Francisco — requiring landlords to disclose the location of smoking and non-smoking units of their building prior to signing a lease with a prospective tenant.

Youth Leadership Institute: Addressing Social Justice by Limiting Tobacco Sales Exposure in Communities of Color (2008–2012)
Through two cycles of CAM, the Youth Leadership Institute worked to successfully compel the Board of Supervisors to amend the health code to include a policy that limits the amount of tobacco retail permits allowed per supervisorial district.

Ways to use these case study snapshots:

- Onboarding new staff, Project Coordinators and Emerging Community Leaders to learn more about the CAM
- As templates to create your own snapshots to highlight your grantees' work
- To learn and spark ideas about the steps and processes of CAM

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COMMUNITY HEALTH EQUITY & PROMOTION

To read more case studies, visit: www.sftobaccofree.org/case-studies

Project E-NUFF's No More Flavors

Addressing Flavored Tobacco in San Francisco

(2015 – 2016)

Step 1: Train Participants, Name the Issue & Choose Area of Focus

Through grassroots education, advocacy and direct services, Breathe California fights lung disease, advocates for clean air, and advances public health.

Project E-NUFF is Breathe California's group of Emerging Community Leaders focused on the issue of menthol and flavored tobacco in their communities. From 2015 to 2017, Project E-NUFF engaged a dozen young adults, representative of diverse backgrounds and cultures to support legislation to end the sale of menthol and flavored tobacco products in San Francisco.

Step 2: Define, Design & Do Community Diagnosis

As a part of Project E-NUFF's community diagnosis, secondary and primary research methods were conducted to research the issue.

The Emerging Community Leaders (ECLs) conducted a literature review to research the following questions:

- What are the public health concerns surrounding flavored tobacco products?
- How are flavored tobacco products harmful to certain communities? Are they more harmful than traditional/non-flavored tobacco products?
- Which flavored tobacco products are used the most by youth? Adults? Other communities?
- What proportion of youth tobacco/e-cigarette users regularly use *flavored* tobacco products?

- What are the primary reasons youth use flavored tobacco products?
- Are flavored tobacco products a gateway to nicotine addiction?

For their primary research, 152 public opinion surveys of youth were collected at high schools and youth-serving agencies in the Tenderloin, Bayview, and Excelsior neighborhoods in San Francisco (neighborhoods with a higher proportion of youth and people of color). One focus group with 11 adults in the Bayview district was also conducted to learn more about their thoughts on youth tobacco use and to reflect on their own experiences with tobacco. Lastly, ECLs also conducted key informant interviews to explore the issue from various stakeholder perspectives. Key informant interviews were conducted with the following stakeholders:

- Carol McGruder (African American Tobacco Control Leadership Council)
- Ken Yeager (Santa Clara County Board of Supervisor)
- Cynthia Hallett (Americans for Non-Smokers Rights)
- Tanya Bustamante (former Tobacco Prevention Program Manager Berkeley, CA)
- Lorna Sumaraga (Health Educator-Santa Clara County Department of Public Health)
- Retailer from the Arab American Grocers Association
- Dr. Phil Gardner (Program Officer for Policy Research and Neuroscience: Tobacco Related Disease Research Program)

Step 3: Analyze Results of Community Diagnosis

Based on their community diagnosis, the ECLs were able to find evidence that suggests that flavored tobacco products are harmful to the community and are easily accessible. Their findings also suggest that there was support for a policy to end the sale of flavored tobacco products in San Francisco.

Key informant interview findings:

- Ending the sale of all flavored tobacco products in San Francisco will protect youth from tobacco initiation and close legislative loopholes in tobacco regulation.
- Establishing strong relationships with community members and policy leaders highlights the fact that increasing tobacco control affects everyone and serves for the betterment of the community as a whole.
- Approaching the topic of flavored tobacco from a social justice framework is mandatory for successful advocacy and influencing policy makers.

Survey findings:

- 60% of survey participants said their peers get tobacco from friends while 58% reported that peers get tobacco from the store.
- 32% of survey participants believed that their peers use flavored tobacco products because "it tastes good."
- 32% of survey participants have reported ever using hookah and 31% have reported ever using electronic cigarettes.
- Flavored blunts are the most preferred flavored product. 67% of survey participants who have ever used a blunt product prefer flavored blunts.
- 88% of survey participants who think flavored tobacco products are harmful think San Francisco should stop selling flavored tobacco products.

Focus group findings:

- Bayview community residents believe the excessive access to tobacco use has become normalized among the youth in the Bayview community.
- All the participants who have ever smoked started before the age of 18.

- All the participants agreed with the idea of SF ending the sale of flavored tobacco products, but many expressed skepticism about its effectiveness.
- Youth use flavored products with the belief that they are less harmful without being aware of the harmful effects.

Step 4: Select Action of Activity & Implement

Project E-NUFF's action goal was to support legislation in San Francisco to pass a policy to end the sale of menthol and flavored tobacco products. To build power and confidence to achieve this goal, Project E-NUFF's team developed an educational packet and endorsement form (https://tinyurl.com/E-NUFF), presented to community organizations, identified policy makers, developed a media campaign, and drafted a policy. After developing these materials, they presented their policy to the Health Commission and were able to receive a resolution. Simultaneously, a City elected official took up this issue and proposed a ban on the sale of all flavored products in Spring 2017.
This ordinance was unanimously passed and would have become law in Summer 2017 until it was challenged by a tobacco industry-led referendum process.

Step 5: Maintain & Enforce Action or Activity

The policy to end the sale of menthol and flavored tobacco products was approved by San Francisco voters on June 5, 2018 and went into effect July 20, 2018. Full enforcement of the policy began on January 1, 2019 and is being conducted by the San Francisco Department of Public Health's Environmental Health Branch.

San Francisco Health Code, Article 19Q: Prohibiting the Sales of Flavored Tobacco Products
Tobacco retailers can no longer sell flavored tobacco products, such as e-juice, hookah, smokeless tobacco, cigarettes, cigarillos, etc., which contain an ingredient that imparts a characterizing flavor. https://tinyurl.com/SF-19Q

Literacy for Environmental Justice

Youth Envisions Good Neighbor Program (2003–2004)

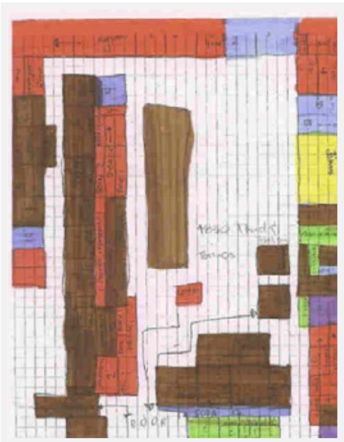
Step 1: Train Participants, Name the Issue & Choose Area of Focus

Literacy for Environmental Justice (LEJ) is an urban environmental education and youth empowerment organization created specifically to address the unique ecological and social concerns of the community of Bayview/Hunters Point in San Francisco and the surrounding communities of Mission, Potrero Hill, Visitacion Valley, and Excelsior. LEJ engages urban youth in traditional environmental problems by making concrete linkages between the state of human health, the environment, and quality of urban life.

LEJ recruited six to eight youth each year to work as Emerging Community Leaders (ECLs) within its Youth Envision program to organize around the issue of food security in San Francisco's Bayview Hunters Point (BVHP) neighborhood.

Step 2: Define, Design & Do Community Diagnosis

As a part of Youth Envision's community diagnosis, ECLs employed a variety of strategies to research and assess food security and tobacco food subsidiary issues in BVHP.



ECLs researched existing Good Neighbor policies in other cities nationally as a tool to pursue improvement in the community. The aim was to work closely with small business merchants to stock healthier food alternatives and to limit the sales and advertisements of tobacco subsidiary products.

ECLs conducted surveys to research resident's perceptions and experiences in accessing healthy foods. Moreover, they diagramed 11 corner stores in BVHP and color-coded them to estimate the amount of shelf space dedicated to packaged food, alcohol and cigarettes, all other beverages, meats, produce, and non-product foods. In these 11 stores, they also counted the total number of Kraft/Nabisco products (previously Philip Morris/Altria food subsidiaries) sold in the stores.

The ECLs worked with a student intern at UC Berkeley to research existing city-sponsored economic incentive mechanisms for small merchants in San Francisco and conducted interviews with corner store merchants. Lastly, in partnership with Crissy Field Center, a GIS map of the BVHP area was developed and ECLs met with Rainbow Cooperative Grocery and other food co-operatives to learn more about connecting small retailers to produce and healthy foods.

The goal of the Youth Envision Good Neighbor project is…

"to collaborate with local food retail establishments in Bayview Hunters Point neighborhood to promote an environment that encourages healthy living and improves the food resources of all the residents in the community.

As such, the replacement of tobacco subsidiary products with healthy and locally produced food alternatives is essential to the health of the Bayview/Hunters Point community."

Step 3: Analyze Results of Community Diagnosis

BVHP residents lack access to culturally appropriate, affordable, and healthy food – the definition of food insecurity. Many BVHP residents are forced to rely on corner stores as their main food resource. Corner stores tend to carry alcohol, cigarettes, and non-perishable packaged and convenience foods of poor nutritional value. When fresh produce, dairy and meat are available, they tend to cost consumers far more than if they purchased the same products in a supermarket. Lacking access to high quality food and fresh produce contributes to increasing rates of chronic diseases and obesity.

ECLs surveyed 130 residents regarding their perceptions and experiences in accessing healthy foods. Of those surveyed:

- 40% reported buying most or all of their food at a supermarket and not in their neighborhood
- 20% reported getting their food from a corner store
- 57% cited the high cost of food as a problem or barrier
- 52% said poor quality food and 48% said the unavailability of food were big problems
- 47% said that the bigger food stores were not accessible by public transportation
- Nearly 25% reported eating fast food or take out most days or daily
- 40% of respondents said that better quality and variety of foods at corner stores and/or the addition of a nearby farmers market or nearby super-market would most help them gain access to healthier food.

Based on the corner store diagrams, ECLs found that fresh produce only made up 2% of the total products carried by the 11 stores that were diagramed. Additionally, they found that over 90% of cookies and nearly 80% of cereals and crackers in all the stores were Kraft or Nabisco products.

Merchants said the hardest part of having a business in the neighborhood was the danger and disruption of the local drug traffic and resulting neighborhood blight.

Based on the GIS maps that were developed, ECLs found that the census tracks where the majority of the BVHP population lives are primarily hillside areas, while the local grocery stores are in the "flats" over one-half mile away. Existing public transportation required about one hour and an average of three bus transfers from Hunters Point Hills to get to the closest supermarket. After meeting with Rainbow Cooperative Grocery and other food co-ops, they arrived at an agree-ment wherein Rainbow would make bulk, low cost and organic replacement prod-ucts available to BVHP merchants who agree to participate in the Good Neighbor Program.

Step 4: Select Action of Activity & Implement

Youth Envision's team focused on:

- Improving access to healthy food in existing corner stores, the primary food resource in the neighborhood, and
- Decreasing the presence of tobacco subsidiary products and tobacco and alcohol advertising in 11 corner stores in BVHP

Through collaboration with LEJ staff, ECLs, and DPH health educators, the Good Neighbor (GN) Program was developed. A member of the SF Board of Supervisors championed and successfully accomplished the creation of GN by bringing together stakeholders, city departments, and others with the CAM team over a series of meetings. The program was city-sponsored and would partner with Community-Based Organizations to encourage merchants to reduce tobacco advertisements as well as increase healthier food products available to the community. This was done in exchange for city-sponsored incentives, including infrastructure improvements, energy efficient fridge units, store branding, free advertising, and cooperative buying opportunities.

LEJ identified a store in the BVHP to pilot the Good Neighbor program. LEJ's Youth Envision led the campaign to promote the Good Neighbor store, to encourage support, patronage, and recognition by the community, and to include information about the benefits of good nutrition and the dangers of tobacco subsidiary products while encouraging consumers to purchase healthier foods. LEJ ECLs piloted alternatives to tobacco subsidiary products in BVHP corner stores and introduced the GN program criteria.

Step 5: Maintain & Enforce Action or Activity

LEJ worked with a coalition of public agencies and non-profits to create a sustainable means by which small merchants would be supported to provide healthy, affordable, non-subsidiary food products and produce with incentives provided by city government and the local community. The Mayor's Office of Economic Development was identified as the administration and housing parent agency of the Good Neighbor program. A GN MOU/Agreement document listed other city and Community-Based Organization partners including the San Francisco Department of Public Health, Department of the Environment, the Redevelopment Agency, Mayor's Office of Community Development, LEJ, and other CBOs and outlined roles, resources, and goals. http://www.healthyretailsf.org/

The Good Neighbor Program paved the way for the development of the Healthy Retail SF Program (https://tinyurl.com/HRSFcasestudy) , a unique citywide public-private collaboration to transform neighborhood corner stores into healthy-food retailers in San Francisco.

San Francisco Apartment Association and Dolores Street Community Services

Clear the Air Before You Rent (2012–2013)

Step 1: Train Participants, Name the Issue & Choose Area of Focus

San Francisco Apartment Association (SFAA) provides a variety of informational and advocacy services to San Francisco housing owners ranging from relevant local and state legislation, rent control, earthquake preparedness, and assistance with tenant screening for property management. Dolores Street Community Services, a tenants' right advocacy organization, nurtures individual wellness and cultivates collective power among low-income and immigrant communities to create a more just society, with focus on the challenging world of low-income housing attainment and retention.

In San Francisco, many long-term residents are allowed to smoke in their apartments. When new tenants object to being exposed to secondhand smoke in their apartment, the most common consequences are complaints to the landlords, conflict between neighbors, and broken leases.

Secondhand smoke (SHS) kills tens of thousands of Americans every year and causes life-threatening illnesses for thousands more. For people living in multi-unit housing units or apartments, it is common for SHS to travel into and out of open doors and windows, shared ventilation systems and walls, ceiling crawl spaces, and gaps around light fixtures, plumbing, electrical wiring, baseboards, and ductwork. Thirdhand smoke is also an issue for many. Thirdhand smoke is the toxic residue from tobacco smoke that remains on a variety of indoor surfaces, such as drapes, walls, carpets, dust, furniture, as well as clothes, hair, and skin long after smoking has stopped.

From 2010–2013, Dolores Street Community Services and SFAA, in collaboration with the San Francisco Department of Public Health, worked to develop a tobacco smoke disclosure policy. The proposed policy would identify and communicate non-smoking areas of buildings, prior to signing a lease with a prospective tenant.

A group of six Emerging Community Leaders (ECLs) with experience in health advocacy or property management were recruited to work on exploring and supporting a citywide secondhand smoke disclosure solution. They were a diverse group of four women and two men, representing African American, Latino, and white racial/ethnic groups.

Step 2: Define, Design & Do Community Diagnosis

As a part of their community diagnosis, the ECLs researched model secondhand smoke disclosure policies and the types of policies that had been passed by other local jurisdictions. They also researched best practices and lessons learned from those who had worked on similar policies. As a part of their primary research collection, the ECLs surveyed 380 landlords throughout San Francisco about their experiences with SHS issues in apartments to determine the nature and scope of the issue. In collaboration with Dolores Street Community Services, 208 tenants were surveyed to get renters' perspectives and experiences about drifting smoke in multi-unit housing. Lastly, the ECLs conducted interviews with Rent Board Commission staff and landlord attorneys for third-party opinions on a smoking disclosure policy.

Step 3: Analyze Results of Community Diagnosis

Based on their research, the ECL team learned that much activity has taken place around the country and in various communities on this issue. Due to concerns from many tenants and owners of multi-unit housing, many cities, housing authorities, and apartment building owners have taken steps to prevent or eliminate SHS from units. Considerable concern and supporting health data about tobacco smoke that infiltrates into homes from a neighboring unit has driven much of the action nationwide: they also found that by November 2011, smoke-free housing policies had been adopted in 54 communities in California alone.

Of the 380 landlords that were surveyed, they found that:

- Almost half of landlords surveyed reported having received a complaint about secondhand smoke.
- Two-thirds of landlords surveyed would support a new law to tell prospective tenants the location of units where smoking cigarettes or other tobacco products in allowed and where it is not allowed.

Of the 208 tenants that were surveyed by Dolores Street Community Services:

- When asked why they didn't ask if smoking was allowed as prospective tenants, 49.3% said they "didn't think to ask."
- Over half of tenant respondents who indicated that a neighbor smoked reported that secondhand smoked did drift into their apartment.
  Of those, over 70% had not reported this to the landlord.
- 59% of survey respondents reported that they or a visitor had gone outside to smoke.
- 72% of tenants reported that they would want to know if the room they were moving into was smoke-free.
- 87% of tenants indicated at least some level of support for a disclosure law, and half indicated a high level of support.

After interviewing Rent Board Commission staff and landlord attorneys, ECLs learned that there was general confusion between statewide legislation (California Senate Bill 332). This law was passed in 2011 and codifies a landlord's ability to prohibit smoking on a residential rental property. Interviewees were unclear what a new citywide disclosure policy would mean for landlords and tenants in San Francisco. A second issue was concern that the proposed policy be clearly written to serve as a warning of areas where tobacco smoke COULD feasibly be emanating from, not where it necessarily WILL come from. This would reduce landlord liability as well as reduce scapegoating of renters who may or may not actually allow smoking in their own units. As such, the disclosure policy was written to be merely a disclosure of areas where smoking is allowed.

Step 4: Select Action of Activity & Implement

The ECLs drafted a disclosure policy that they believed was both politically achievable and balanced tenant protection and property owner liability, while moving towards the goal of healthier housing. The proposed policy required that property owners with less than 100% smoke-free rental properties must:

- Designate all units as either “smoke-free” or “smoking optional” (meaning it is allowed for smoking optional tenants to smoke, per their lease)
- Include in vacancy listings, the unit designation as smoke-free or smoking optional
- Disclose in writing to all applicants who would be offered the apartment prior to entering into a new lease or rental agreement whether the vacant unit is designated as smoke-free or smoking optional
- Provide a list to any rental applicant who will be offered the apartment showing the designation of all areas that are smoking optional (it is allowed for those neighbors to smoke, per their lease)
- Develop and maintain a master listing that shows the location of all smoking optional units

The ECLs believed the policy was achievable because state law already required landlords to make several other types of disclosures about their buildings. In addition, the smoking disclosure policy implementation should ease landlord/tenant tension, tenants breaking leases due to SHS, and conflicts between neighbors. SFAA and Dolores Street Community Services were able to build consensus among landlords and tenants and then worked together to generate broad-based support for a policy that would benefit everyone. Endorsers of the policy included the tenants' rights community, Housing Rights Committee, Just Cause (Causa Justa), Dolores Street and Mission SRO, along with SFAA, a local property management company, the SF Rent Board, and industry attorneys that represent landlords. The ECLs presented their proposed policy and endorsements to a member on the Board of Supervisors who agreed to sponsor the policy.

Step 5: Maintain & Enforce Action or Activity

The policy was passed unanimously by the full Board of Supervisors on January 15, 2013. The ordinance does not require property owners to enforce the smoke-free designation and is not meant to provide a guarantee that units designated as smoke-free will be smoke-free. The intent is to provide an educative and informative tool for property owners, tenants, and prospective tenants.

San Francisco Housing Smoking Disclosure Ordinance, Article 19M

Allows landlords and tenants to gain and share more information. Tenants will be able to determine the smoking status of their potential unit as well as neighboring units prior to entering into a rental agreement. https://tinyurl.com/SF-19M

Youth Leadership Institute's Tobacco Use Reduction Force

Addressing Social Justice by Limiting Tobacco Sales Exposure In Communities of Color (2008–2012)

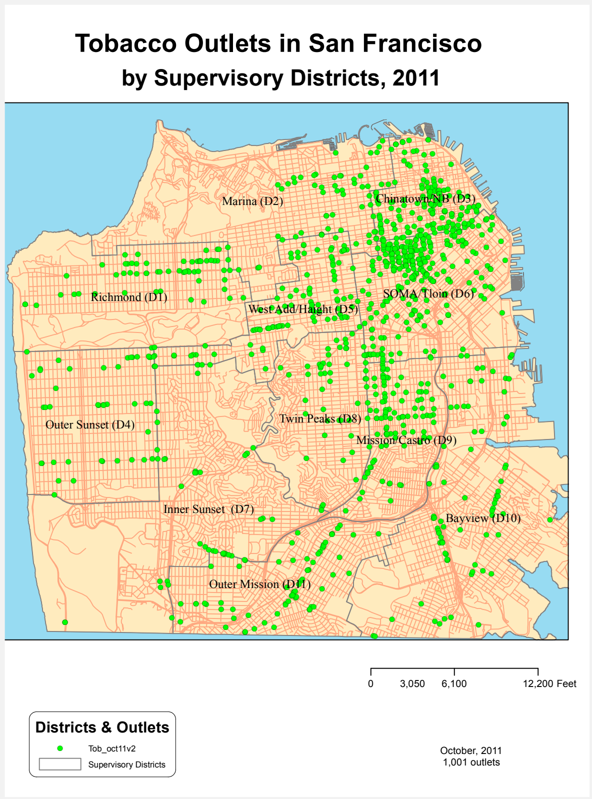
Step 1: Train Participants, Name the Issue & Choose Area of Focus

Youth Leadership Institute (YLI) creates communities where young people and their adult allies work together to create positive social change. The Tobacco Use Reduction Force (TURF) project was YLI's prevention youth council whose main goal was to develop a land-use policy that would limit the number of tobacco retailers and reduce youth smoking citywide in San Francisco.

YLI's TURF group focused on the overconcentration of retail outlets selling tobacco in many San Francisco neighborhoods. They identified that this created a major public health concern especially for low-income residents and communities of color that were more likely to have a higher numbers of tobacco-retailer outlets in their neighborhoods.

Through two cycles of CAM and two cohorts of Emerging Community Leaders (ECLs), TURF participants included a total of 15 ECLs. For the first cohort in 2008, participants included 7 high school and college-age ECLs. For the second cohort in 2011, participants included 6 young women and 2 young men, ranging in age from 16 to 21, representing a diversity of ethnic and cultural backgrounds.

Step 2: Define, Design & Do Community Diagnosis



As a part of TURF's community diagnosis, a variety of secondary and primary research methods were conducted. In the first cycle (2008), ECLs conducted their secondary research by reviewing existing policies and laws, meeting with decision-makers and stakeholders, and conducting a literature review. For their primary research, ECLs created a community mapping project to show trends between current population distribution, income level, percent of youth and people of color, and retail stores with tobacco permits. Additionally, ECLs surveyed 300 residents and community members to show that the community would support a policy that changes the tobacco retail density in low-income neighborhoods.

In the second cycle (2011) of the TURF project, ECLs went on community walking tours and met with community organizers in different neighborhoods to learn more about the tobacco density issue. They conducted their secondary research similarly, by reviewing existing laws and opinions. ECLs then updated existing community mapping data from the previous group to reflect new Census and local neighborhood district redistributing data, and worked with City officials to examine how tobacco permits were distributed in the city by district.

Step 3: Analyze Results of Community Diagnosis

After receiving training to develop their research and analytical skills, ECLs analyzed their collected data to learn how tobacco is a social justice issue. The ECLs (2008) went on to find that in San Francisco, many of the districts that are low income, and have higher populations of youth and communities of color have a disproportionate number of tobacco retail outlets. These conditions, in turn, lead to higher rates of smoking and disease, illness, and death.

Public opinion surveys collected by TURF in both cycles found strong public support to limit the density and number of cigarette retailers in San Francisco. The 2009 survey of residents in four different San Francisco neighborhoods revealed that 83% supported limits on stores selling cigarettes in low income communities with large populations of children and youth. The 2012 survey found that 88% of respondents agreed that too many stores selling cigarettes were bad for their community's health.

Step 4: Select Action of Activity & Implement

The TURF team's (2008) action goal was to pass a policy that would reduce the number of tobacco retailers in San Francisco by amending the San Francisco Health Code (Article 19H) to establish a cap of 45 tobacco retailer permits for each supervisorial district. To build power to achieve this goal, the TURF team (2008) developed an educational packet, identified stakeholders, and conducted community outreach to educate residents about the potential policy. The TURF ECLs selected an ally on the Board of Supervisors and prepared a comprehensive package, including their research, survey findings, and tobacco retailer density maps to use in their presentation when they met with the Supervisor. However, the then the Mayor at the time also introduced legislation to the Board to limit all tobacco sales within 1000 feet of public and private schools. The TURF ECLs (2008) supported the Mayor's efforts but ultimately had concerns about the unintended consequences for family owned businesses and the narrow focus on youth exposure. Finally, the proposal lost momentum in the legislative process and was not adopted. The ECLs shifted their action plan to amend the Mayor's proposed legislation to close loopholes.

The second cycle of the TURF team (2011) established a TURF Advisory Board made up of youth and young adult labor and community advisors who provided feedback on the materials and presentations the team developed so that the ECLs could create an effective action plan. They received media coverage on their campaign, created two educational videos, held a community event, and built off the endorsements received from the previous cycle. Extensive negotiations also proceeded with a key stakeholder, the Arab American Grocers Association (AAGA), who had concerns about the earlier proposed policy when it was first being considered in 2009. After aligning all these supporters, Supervisor Eric Mar agreed to sponsor the policy in 2013. The Health Commission and the Youth Commission passed resolutions in support of the policy, and the ECLs found a new champion for the legislation who was motivated to do something about the identified health inequity. Through two cycles of CAM, the TURF team was able to successfully encourage the Board of Supervisors to unanimously approve the policy in December 2014.

Step 5: Maintain & Enforce Action or Activity

The policy went into effect on January 18, 2015. This policy sets a cap on the number of tobacco retailers allowable per supervisorial district and aims to reduce the number of outlets where community members can access or be exposed to tobacco over time. The policy also protects low income communities and communities of color that have disproportionately high numbers of tobacco retailers in their neighborhoods, as well as disproportionately higher smoking rates.

City Departments set up systems and regular meetings to implement and enforce the policy elements, collect data on the progress of density reduction, and report back to community and decision-makers. As a result of this policy, the total number of tobacco retailer permits went down from 970 in June 2014 to 604 in January 2023.

San Francisco's Tobacco Retail Density Policy, Article 19H

Permits to sell tobacco will not be issued to establishments where:

- The total number of existing permits in the Supervisorial District exceed 45
- The location is within 500 feet of a school.
- The location is within 500 feet of another location permitted to sell tobacco
- The location was not previously occupied by a permitted store
- Restaurants, bars, or other tobacco shops that are not already permitted

https://tinyurl.com/SF-19H

Philosophy & Values of the CAM

The founders of the Community Action Model developed this 5-step cycle out of the values and concepts found in Popular Education and Paulo Friere's work. Other community-led public health models, such as Community-Based participatory research (CBPR) and Participatory Action Research (PAR), have similar roots. Other values also guide our practice in implementing the Community Action Model program, such as building community capacity, on-going quality improvement, and a cultural of learning and reflection.

Popular Education

Popular Education is a method and philosophy of education that holds oppressed people at the center of the learning process. It's an educational pedagogy in which participants and educators are co-learners who critically reflect on issues of inequity in their community and take action to change them, resulting in transformation for themselves and society.

Key Principles of Popular Education Applied to CAM

Principles adapted from School of Unity and Liberation
https://www.schoolofunityandliberation.org/

The aim of education is radical transformation

- Goal of the CAM is to transform society through Policy-System-Environmental change and to transform Emerging Community Leaders through capacity-building
- CAM Program funds and builds capacity of ECLs most impacted by the health inequities

Relevant themes, rooted in lived experiences towards empowerment

- Even though the CAM topic may have already been chosen by their organization, in Step 1, ECLs and PCs make personal and relevant connections to their health issue.

Collaboration problem-posing and the search for solutions

- Throughout CAM, Project Coordinators and Funding Agency staff develop workshops to set up processes in which Emerging Community Leaders can arrive at answers, decisions and plans on their own.
- In CAM Steps 2 & 3, the Emerging Community Leaders explore and understand the root causes of the health issue through community-led research. They define the problem, develop the research plan and tools, and conduct the research themselves.
- In Step 3, ECLs become the experts about their issue and share their knowledge with fellow community members, stakeholders and even those who would be considered the experts.
- In Step 4, ECLs identify and mobilize others towards a solution, or an Action, to address their issue, often times challenging existing power structures in society.

Reflection and action

- The CAM cycle is cyclical, signifying that ECLs may repeat all steps to address their issue after critically analyzing their challenges and barriers and celebrating their success.
- Funding Agency staff also critically reflect on their own success and challenges throughout the cycle to improve the implementation of the program.

In the implementation of CAM, the Funding Agency staff models and utilizes popular education in its trainings, facilitation of meetings and one-on-one relationship with CAM Project Coordinators through the 5 Steps of the CAM. In turn, the Project Coordinators integrate popular education principles and values in their development of workshops and their support of Emerging Community Leaders, leading to transformation of themselves and their community. More detail about operationalizing this is described in Training and Technical Assistance Structure and the Step 1 Guide.

Participatory Action Research

Participatory Action Research (PAR) flips the script of traditional, academic research. Community members who are typically the subjects of research are equipped with the skills to become researcher themselves. Instead of academia and institutions gathering data and creating narratives about the community and their wellbeing, community members invite their peers in developing a more authentic narrative of findings and recommendations. Participatory Action Research is also rooted in principles of Popular Education by challenging the power dynamic of teacher and student as well as valuing community-led problem solving towards solution. Steps 1–3 of the CAM mirrors the values and process of PAR. The ECLs are the ones who lead all steps of the research process from identifying the issue to conducting the research to developing the recommendations. Most importantly, they do not conduct research for the sake of research, rather research leads to action in Step 4 through building power and compelling a decision-maker to create an impactful, lasting change.

Community Capacity Building

Community capacity building is the most important goal of CAM! We want to see community members, Community-Based Organizations and their staff acquiring the skills, structures, resources to address health issues themselves. All efforts in training, technical assistance and support, deliverables and progress reports are purposefully building the skills and leadership of Project Coordinators and their Emerging Community Leaders. There is no one-size fits all capacity building approach in the CAM. Instead, we strive to meet the needs of each Project Coordinator and team to set them up to successfully complete each step of the CAM. Capability building also happens at the organizational level. Through CAM, CBOs expand their network of partners, engage key decision-makers, and increase their confidence in creating lasting PSE change. This builds their capacity to implement interventions at higher levels of the spectrum of prevention, away from individual knowledge and skills towards changing policy, systems, and environments.

Continuous Quality Improvement

To truly build the capacity of Community Action Model Project Coordinators and their ECLs, we are continuously engaging in quality improvement through reflection and action. Though the CAM program deliverables, training and timeline seem predetermined, we hold them lightly and allow for adjustments based on input from PCs and ECLs. Throughout CAM, we ask for feedback through various methods so that we can quickly respond and incorporate change, sharing back any adjustments as acknowledgment. We also utilize outside evaluators to gather unbiased feedback from our CAM PCs and ECLs to identify recommendations for the next iteration of the program. Internally, as Funding Agency staff we meet regularly to reflect, analyze, and document improvements for the next month or next cycle based on the feedback. Without having the posture of humility and willingness to implement changes, we would not have tried out “innovations” in CAM and learned lessons that have become best practices. We believe each Funding Agency’s CAM Program will look different because they have adapted, incorporate changes that best meets the needs of their priority communities, Community-Based Organization and Emerging Community Leaders.

II. Engaging and Funding CBO Partners to Participate in the CAM

Building on the CAM and Popular Education philosophy and values, selecting the right Community Based Organizational (CBO) partner to lead the Emerging Community Leaders through the model activities is one of the key components to the Community Action Model. Just as Popular Education holds oppressed people at the center of the learning process (see page 33), the CAM holds non-traditional community-centered organizations at the center, or as a focus of the released funding. This means creating an application process that is understandable, easily navigable by an agency that wouldn't otherwise apply for government funding, as well as one that may serve as a learning tool of its own.

To the extent possible, the Tobacco-Free Project has strived to ensure that the CAM Request for Proposals (RFP) process was **approachable** (free of excess jargon) and transparent, **educational** (explaining any jargon that must be included), and **supportive** (providing ample time and opportunities to ask for clarifications). Each RFP cycle has been designed in such a way that an organization without any prior CAM experience, and especially those who may have direct ties to their communities but limited experience with large-scale government funding, could apply and be selected to receive funding. A copy of past RFPs can be available upon request. Email tfp-chep@sfdph.org.

The Request for Proposal process will vary and depend on the internal processes and requirements of the funding organization, however there are a few practices that we recommend funders consider:

- **Targeted outreach to non-traditional grant recipients**. This step takes time and intentional research but is crucial to engaging of partners who don't regularly monitor government funding releases. Create a list of education or social services organizations working in priority neighborhoods or communities, faith-based organizations, youth-focused organizations, or associations/coalitions working on environmental issues, small business support, immigrant resource organizations, or independent living/ elder care. Depending on the policy, system or environmental changes your funding is aimed at addressing, a variety of stakeholders may be interested in working on creating that change. Send the release of funding notification with as much information as possible to these groups by email, as well as by traditional mail. Engage other existing partners and coalitions in sharing the funding notification in their professional and personal circles to further expand reach of the funding notification.

- A **webinar or a recorded video** regarding the Community Action Model, that organizations unfamiliar with the model could refer to throughout the application process (Sample: https://www.youtube.com/watch?v=vy-3dPTBXKOU&t=5s). This video or webinar should be accessible in language (less jargon or abbreviations, and translated or captioned, as needed), and provide a clear overview of the program, goals and requirements.
- Consider an **"RFP Roadshow"** - any time there's an opportunity to share that funding is available – take it! Prepare a quick 10–15-minute slideshow about the funding released and where to find more information. Present briefly about the funding available at any coalition, stakeholder group or community meetings; To other branches within your funding organization, or to other partner agencies; To City or other government leaders (as allowed) so that they can share with their constituents, etc.
- A "bidders conference" or an **opportunity to ask questions** about the model, RFP, funding requirements and application process in a "real time" setting (in person *or* virtual). All of the asked and answers given should be recorded and posted post conference, prior to RFP deadline.
- A **sample of the CAM project workplan** and deliverables included in the RFP (please email tfp-chep@sfdph.org to request a copy of past RFPs) to give the applicant a sense of the expected work. We also recommend

including a list of clear and reasonable Minimum Qualifications for the Project Coordinator.

- Clear and transparent outline of the **selection process** in the RFP with clear timelines. Also consider including the scoring rubric (please email tfp-chep@sfdph.org to request a copy of past RFPs) so the CAM applicants know exactly what is expected of their application. When setting up the scoring rubric, consider how applications from non-traditional partners can compete with agencies with experienced grant writers, and allow for additional "points" to be awarded for having strong relationships with the priority community you're hoping to reach and engage through the CAM process.
- An **interview process** for top-scoring proposals. Just as a resume of a potential hire doesn't always paint an accurate picture of an applicant, an RFP submission can sometimes fail to highlight the capacity of organizations without a highly skilled grant writer. Implementing a fair and objective interview process may allow some of the less traditional applicants another opportunity to speak about their qualifications, connection to the community members and understanding of the funding offered.

Some of the key considerations when selecting the "right" organization to complete the CAM work are as follows, though you can find more tips at the end of this section.

Ability to effectively engage and recruit community members in the target population

One of the goals of the CAM is to empower community members most impacted by a public health issue to transform society through Policy-System-Environmental changes. In order to be successful in accomplishing this feat, the funded organizations must be able to recruit and retain community members in the CAM programming. The success of 1–2 year CAM projects depends on the consistency and passion of the recruited Project Coordinators and Emerging Community Leaders; here are some ways to gauge this organizational recruitment ability in the RFP:

- Allow the CAM applicants to describe their organization's population they serve, organizational strengths and skills, organizational capacity and resources, etc. This can be in the form of a Proposal Narrative or questions/answers.
- Consider weighing and valuing these responses higher than other areas of the application.
- Accept additional supporting documents with the RFP that support the organizations' application. For example, letters of support, past grant successes or reports, etc.

Demonstrated capacity building experience

Community capacity building is the most important goal of CAM! Community members, Community-Based Organizations and their staff acquiring the skills, structures, resources to address health issues themselves. Agencies that are trusted by their communities, thoughtfully build capacity of folks most impacted by health disparities, and that are willing to shift their practices towards creating Policy-System-Environmental (PSE) change are the "right" agencies. Here are some tips on gauging organizations' capacity building ability:

- Intentionally ask applicants to describe their organization's history and past similar projects/programs. This can be in the form of a Proposal Narrative or questions/answers.
- Provide an opportunity for CAM applicants to include key staff profiles and/or resumes, highlighting youth development and capacity building experience.
- Ensure that the RFP clearly communicated that the ECL capacity and skill building is a key aspect of CAM – consider asking applicants to speak about their organizational and individual staff experience with measuring

growth of their clients, and/or staff through pre-/post-test data collection, or similar evaluation methods.

Demonstrated commitment to health equity and/or community leadership development

While actual *experience* in these domains is not a requirement for funding, it is key that the applying agencies demonstrate commitment to, some understanding of, and willingness to learn more about areas such as: health equity, social determinants of heath, community (or youth) development, education and overall community support. The funded agencies do not need to be public health or research experts, in fact, many of the most successful programs in San Francisco were completed by youth development teams and afterschool programs. See examples of previous youth-led CAM projects on page 12.

The Request for Proposals (RFP) should clearly spell out Funding Agency's values and beliefs around health equity. This way, the applying organization can communicate clearly their commitment to the work, and their capacity to learn and apply newly learned concepts in their application and later their work with their community.

Example: 2019 Community Action Model Request for Proposals included an assessment of Community and Geographic Indicators

San Francisco Department of Public Health recognizes that we work with people who exist in a social context. Social determinants of health influence the health of individuals, families, and communities. For example, housing and economic insecurity can cause stress and impact a family's ability to seek care. Systemic issues, such as racism and sexism, shape these social determinants of health leading to health inequities. We ask you to describe how these factors impact the health of the community your CAM project will be impacting and/or recruiting community leaders from.

Please reflect on your community's geographic indicators and ratings by summarizing and describing how social determinants of health impact your community's wellbeing and everyday life. What is surprising to you about these data or points to the need for additional investment in your defined community to address health equity? We encourage you to additionally identify and describe other social determinants of health, such as sexual orientation (LGBTQI), race, ethnicity, and immigration status that influence the health of your community. Please remember to cite any sources you use in the format that follows (Mamudu, et.al, Public Health Management & Practice, 2016). (500 words max)

Fiscal responsibility

All funding organizations will have different standards for contracts and released funding. The implementation of the Community Action Model requires fiscal responsibility, capacity to develop a budget, and handling program finances including, but not limited to salaries, ECL stipends, material ordering, travel expenses, and in some cases management of sub-contracts, consultants and other professional expenses. However, it's not always that the program with the best grant writer, or the most detailed budget that rises to the top. In many cases, smaller grassroots organizations can be nimbler and more flexible when handling unexpected expenses and have an easier time addressing the needs of the ECLs and communities they work with when handling stipends, and other payments. Being able to demonstrate thoughtful approach to submitted budgets, and financial responsibility at any scale, is one of many component of a successful CAM funding application.

We recommend weighing the organization's ability to connect with their community members more than a highly detailed budget. An easy to follow, sample budget should be provided with the RFP and reviewed during any informational meetings prior to the RFP due date. Some tips for reviewing budgets submitted by CAM applicants:

- Ensure Project Coordinator is at least 0.8 FTE and has a livable/reasonable salary
- ECL stipends are adequate and clearly outlined
- Adequate budget is allocated for staff development, training, travel and supplies such as office supplies and ECL meeting food/snacks/refreshments
- All proposed expenses are explained and justified
- Indirect expenses do not exceed 15%

Depending on the fiscal requirements of the funding organizations, the CAM grantees may have to be registered 501(c)3 organizations (or equivalent). Smaller Community-Based groups may not have that tax designation and may need to utilize a local "fiscal intermediary" partner for the application and grant implementation process. We suggest having a list of trusted local fiscal intermediary agencies handy so that they can be shared with potential non-traditional applicants.

For California Tobacco Control Program (CTCP) funded projects: You too can include CAM into your CTCP workplan!

San Francisco has selected the "Youth Engagement" or "Adult Engagement" *Asset* for the CTCP workplan and focus on the process and outcome measures around ECL engagement, recruitment, training and overall development.

Since so much of your work with the CAM ECLs *is* focused on developing many new skills and understanding of public health issues, choose the title "CAM Intern" in your workplan instead of "Emerging Community Leader" as a budgeted responsible party to also meet your public health workforce development requirement. When developing the budget, explain that the position funding will come from the CAM Subcontractor budget in the narrative.

Sample Objective:

By June 30, 2021, City and County of San Francisco will annually engage in participatory collaborative partnership with at least 4 youth serving organizations with a total of 15-25 youth (14-20 years old), that represent communities of color, utilizing the Community Action Model (CAM) to train and mobilize their involvement in at least 3 tobacco-related activities per year such as community assessments; engagement and education of stakeholders, development of tobacco-control related policy, environmental and system change; and other activities that address tobacco-related determinants of health. Each CAM Cycle extends two years; therefore resulting in a total of 8 youth serving organizations and 30-50 youth total over the four years.

Sample Activities:

Intervention: For each CAM cycle, provide one 2-4 hour training, to a total of 15-25 youth ECLs and Project Coordinators on campaign development, being a spokesperson, and media advocacy.

Intervention: Provide 100-130 hours of TA to staff of four youth serving agencies per year to guide youth leaders in implementing the CAM through (1) monthly subcontractor meetings (2) one-on-one meetings and other support as it pertains to tobacco control efforts.

Evaluation: Develop a KII instrument and conduct at least 8-10 KIIs with staff from youth serving agencies to gather insight on how youth agencies integrated youth development and engagement in their CAM work.

Evaluation: Develop and conduct pre-and-post survey of 40-60 youth ECLs to assess skills and capacity built through their participation in the series of CAM training.

HOWEVER, that's not the only way to include CAM into the workplan!

The beauty of the CAM approach is how seamlessly it integrates into other CTCP Objectives and activities which would otherwise have to be completed by the Local Lead Agency staff.

Examples of sample activities that incorporate CAM into other Objectives:

Intervention: Flavored Tobacco Products

Objective: Collaborate with Emerging Community Leaders (ECLs) to develop an educational packet to be used in meetings with stakeholder groups. Distribute at least 16 packets through educational meetings.

Intervention: Minimum Price and Pack Size Objective: In collaboration with ECLs, conduct secondary research in the "diagnosis" phase of the CAM process that: (1) researches most recent tobacco minimum pricing/discounting policies; (2) reviews the results of resident surveys; and (3) reviews process for adopting policy. Findings will contribute to the Midwest Academy Strategy Chart (MASC) meeting with the Coalition.

Evaluation: Flavored Tobacco Products

Objective: To give voice to youth CAM Interns, conduct a Photovoice project that informs policymakers, staff, coalition, store owners, general public, etc. about flavored tobacco products sold in youth CAM Intern neighborhoods.

Evaluation: Minimum Price and Pack Size

Objective: Conduct consumer testing to assess feedback on the look, feel, content, language, approach, and action steps in the 1–2-page fact sheet on minimum pricing for stakeholders.

The goal of CAM is to *build capacity* of the ECLs to create Policy-System-Environmental change in their communities.

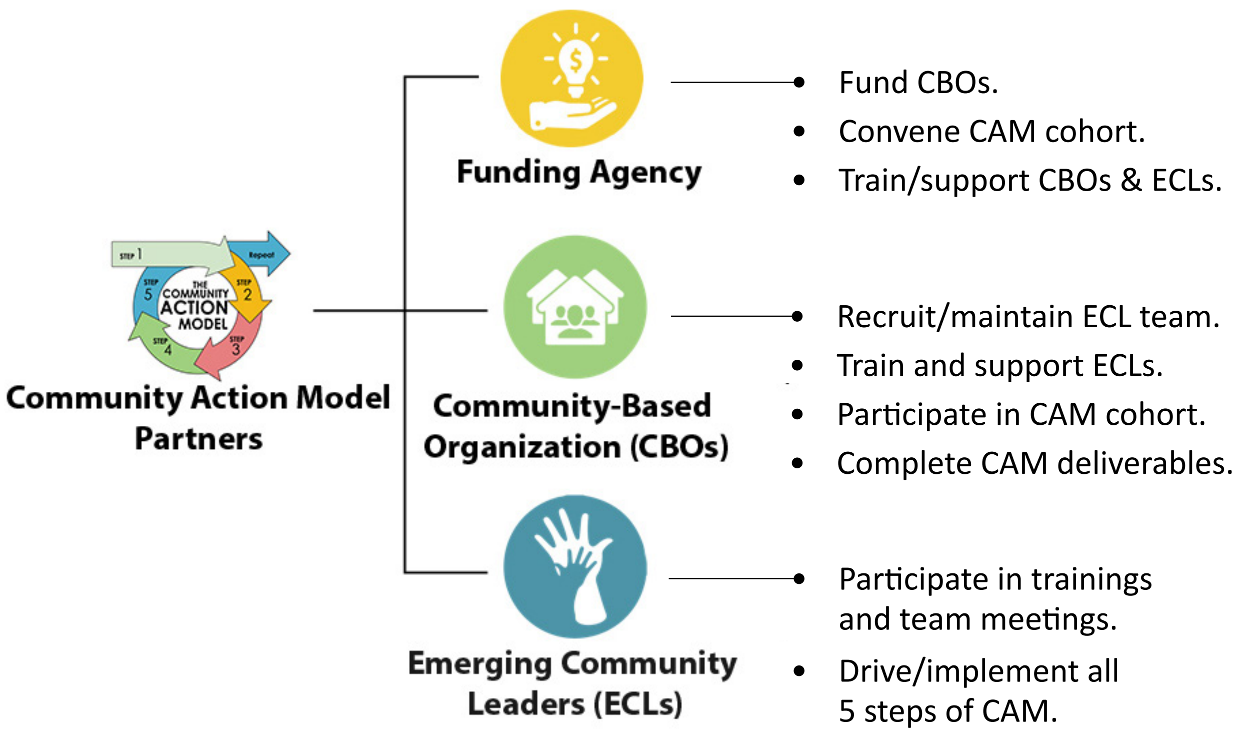
Lastly, we wanted to remind the future CAM Funders, that while it would be ideal for a policy or a system to change as a result of the CAM organizations' work/grant cycle, it is not the ultimate measure of success of the model. We believe each Funding Agency's CAM program will look different because they have adapted, incorporate changes that best meets the needs of their priority communities, Community-Based Organization and Emerging Community Leaders. The development of transferable skills and ECL growth is just as important to showcase as the P-S-E success of each CAM grantee.

CAM Roles & Structure

Within the Community Action Model program, there are three main partners:

1. The **Funding Agency***
   **In our case the San Francisco Tobacco-Free Project*
2. The **Community-Based Organization** Project Coordinator (CBO)
3. The **Emerging Community Leaders** (ECLs).

The roles of the Funding Agency and the Project Coordinator are focused on facilitating the capacity building and leadership development of the ECLs through training and implementation of each CAM step.



"Patent" or Funding Agency icon by Gregor Cresnar (Noun Project), Infographic adapted from Bright Research Group

Funding Agency

The Funding Agency's role is to provide funding or grants to partner with Community-Based Organizations, to train Project Coordinators and Emerging Community Leaders, to provide technical assistance and support, as well as convene partners to learn from one another. The Funding Agency staff works along-side the CBO Project Coordinators and their ECL teams in implementing all five steps of the CAM, providing the training, tools (in the form of deliverable templates), and support needed. Staff leverage their privilege, connections, and resources to support grantees and ensure the success of the CAM teams in completing each of the steps. Read more about the training and technical assistance support best practices "CAM Collaborative Learning: Training & TA Support on page 289."

We recommend that each Funding Agency dedicate at least one staff per two to three (2–3) Community-Based Organizations to build a trusting one-on-one technical assistance and support relationship with their assigned Project Coordinator. This allows for deeper understanding of the Project Coordinator and their team's needs, challenges and strengths throughout the project. We often refer to that staff as the "CAM Staff Lead" for that Community-Based Organization.

It is essential to designate one staff as the CAM Program Manager, who oversees and coordinates the implementation of the overall CAM program, including:

- Contract management and related communication to all CBOs
- Communication to all CBO partners through newsletter, shared documents, email, etc.
- Development of training tools and deliverable reports
- Reviewing all deliverables and reports for continuity across CBO partners
- Plan, develop and coordinate provision of training, including procuring outside trainers

- Plan, convene and facilitate All CAM Project Coordinator meetings to foster collaborative learning among cohort members
- Plan agendas and facilitate internal CAM Funding Agency team meetings
- Program monitoring and evaluation activities

We recommend that the CAM Program Manager still provide one-on-one technical assistance (TA) and support as a CAM Staff Lead to one Community-Based Organization so that they are more knowledgeable about progress, challenges and TA needs of a CBO partner. Based on our estimates, Funding Agency staff are likely to spend the following amount of time per month on implementing CAM-related activities:

Funding Agency Activities		**1 CBO**	**2 CBOs**
CAM Staff Lead	One-on-one Monthly meetings + preparation	1.5	3
	Monthly All CAM PC meeting + preparation	2.5	2.5
	Unscheduled TA requests, (ex. emails, calls, additional one-on-one meeting)	1	2
	Review and provide feedback on deliverables	0.5	1
	Attending and supporting trainings per step	2	2
	Attending monthly internal team meetings	1.5–2	2
	Total Monthly Staff Time:	**9–9.5**	**~ 13**
Program Manager	Monthly All CAM PC Meetings & Internal meeting preparation		2
	Training development or coordination with outside trainers		1-4
	Additional program oversight activities (contract management, communications, etc.)		4
	Total Monthly Program Manager Time:	**7-10 hours**	**7-10 hours**
Grand Total, Monthly Agency Hours:		**16–20**	**20-23**

These hours do not capture other time dedicated to the implementation of the Community Action Model, which often fluctuate depending on the CAM step. For example, at the beginning of the cycle more hours will be dedicated to developing and implementing orientation trainings and technical assistance and support. During Step 4, staff may support CAM projects by being present at Demonstration Projects or stakeholder meetings. CAM Program Manager may also have additional activities such as submitting progress reports to their funder (ex. foundation, state or federal funding source) or meetings with their departmental leadership on CAM activities related to Policy-System-Environmental changes. Alternatively, some roles like processing invoices or evaluation can be assigned to other staff within the Funding Agency that specialize in those activities. The above are estimates are shared to assist your team in ensuring appropriate staffing is in place to make your CAM process a success.

Community-Based Organization Project Coordinator

We recommend that each Community-Based Organization designates or hires one Project Coordinator at least at 0.80 Full Time Equivalent (FTE) to implement the Community Action Model with their Emerging Community Leader team. This PC should work 32–40 hours per week on the project to ensure CAM is properly supported. Their goal is to recruit, train, support and coordinate their team of 6–8 Emerging Community Leaders (ECLs) to complete all steps of the CAM model. In addition, some CBO partners often designate a Program Director level staff on the grant, typically at 0.05-0.1 FTE, to support their Project Coordinator and address grant issues such as contracts, budgets and invoicing.

Roles of the CBO Project Coordinator (PC):

- Recruit and maintain a team of 6–8 Emerging Community Leaders, including stipend disbursement

- Develop and provide weekly at least 1.5 hour trainings/meetings, utilizing and tailoring any provided trainings, to support their CAM team to complete all steps of CAM
- Facilitate and coordinate their ECL team decision-making, planning and completion of all CAM steps, including initiating any meetings with outside partners and stakeholders
- Attend and participate in all Funding Agency trainings, including ensuring that Emerging Community Leader teams attend trainings
- Attend and participate in monthly CBO partner meetings and one-on-one TA meetings
- Communicate with Funding Agency CAM Staff Lead if any technical assistance and support is needed; also share ways the CAM program can improve
- Collaborate with other CBO partner staff and teams whenever possible, sharing strategies, training curricula, and other resources
- Complete all CAM deliverables with the input and content from their ECL team

Many times Project Coordinators fill other roles for their CAM teams, such as case management, social and emotional support, tutoring, and other areas of need for an ECL that enables them to be present and engage in the CAM program. The importance of the Project Coordinator's role in supporting, training and guiding their team to complete the five CAM steps cannot be stressed enough. Project Coordinators have to juggle their roles as an educator, project manager/coordinator, and community leader or adult ally throughout the project. They are also the main point of communication between Emerging Community Leaders and the Funding Agency and ultimately responsible for their team's completion of the CAM steps and deliverables. Lastly, if there is turn-over and transitions of Project Coordinators, out-going Project Coordinators are asked to document and organize the progress and work for their replacement to ensure continuity (and ideally that departing PC will onboard the new staff if schedules can overlap).

Emerging Community Leaders (ECLs)

The role of the Emerging Community Leader is to engage and be trained on completing all steps of the Community Action Model. Their goal is to gain skills, experiences and even social connections that build their leadership in the community. Regardless of how long an ECL stays within the program, we hope that each ECL acquires some skills and experiences that help them exercise their power and voice to create future change wherever they go. The sheer knowledge and ownership of their role as change agents in their community means we have accomplished our goal in the CAM program.

Roles of Emerging Community Leaders:

Attend and participate at minimum weekly 1.5 hour workshops held and facilitated by their Community-Based Organization Project Coordinator.

- Attend and participate in trainings provided by Funding Agency, typically at each step
- Attend and participate in end of the year CAM showcase and celebrations
- Develop and decide on team's plan and activities for each CAM Step
- Implement activities to complete each step of the CAM

Lead Emerging Community Leader

The SF Tobacco-Free Project team also adapted a workforce development strategy from a CAM Community-Based Organization partner, the Youth Leadership Institute, by adding an additional ECL role—the Lead Emerging Community Leader. The purpose of the Lead ECL role is to provide a stepping stone for a community leader to become a future Project Coordinator within the CBO as well as providing additional leadership opportunities. Lead ECLs meet weekly with Project Coordinators to plan and prepare for weekly ECL meetings, facilitate agenda items, take the lead on aspects of CAM step activities by coordinating with other ECLs (ex. survey development, contacting stakeholders, developing the educational packet), and other aspects of the CAM program. Project Coordinators are encouraged to increase leadership opportunities for the Lead ECL throughout the CAM program, allowing an increasing transition from PC responsibility to Lead ECL responsibility for tasks associated with coordinating and training where appropriate.

The next page is a tool that the SFDPH Tobacco-Free Project uses to share with Project Coordinators the different roles of each CAM partner.

Meetings	CBO Project Coordinator (PC)	Project Assistant/ Lead ECL	ECL	Funding Agency Staff
Monthly: All CAM Partners Meetings	• Attend • Participate in activities	• *Attend if appropriate*		• Schedule and organize • Set the agenda • Lead/ facilitate
Monthly: One-on-one Meetings	• Schedule (re-schedule) • Set the agenda & bring questions • Follow up, as needed	• *Attend if appropriate*		• Follow PC agenda • Provide assistance to PC
Weekly: ECL Meetings	• Schedule and organize • Identify what decisions are appropriate for ECL level • Assign duties to Lead ECL • Plan activities and materials • Track attendance/ stipends • Gather training feedback	• Help with setting agenda, taking notes, and/or prepar-ing materials • Facilitate workshops when assigned	• Attend and participate • Other roles later in the year • Carry out PC's assignments (data collection/analysis etc.) • Provide feedback to work-shops and activities	• Attend when requested • Follow the PC agenda and talking points
FUNDING AGENCY PROVIDED TRAININGS:				
For PCs	• Attend and participate • Provide feedback	• *Attend if appropriate*		• Schedule and organize • Lead and evaluate trainings
For CAM Teams (PCs and ECLs)	• Attend and participate • Ensure that ECLs attend • Review ECL understanding after training	• Attend and participate • Support other ECLs to attend • Help PC plan follow up	• Attend and participate	• Schedule and organize • Lead the trainings • Evaluate trainings

Meetings	CBO Project Coordinator (PC)	Project Assistant/ Lead ECL	ECL	Funding Agency Staff
CAM STEPS IMPLEMENTATION & DELIVERABLES:				
CAM Steps	• Facilitate & coordinate completion of all CAM Steps • Ask Funding Agency for TA, support or connections • Initial connection with outside stakeholders, as needed	• Support coordination and facilitation of completion of CAM Steps, including being the lead on a specific portion of a Step (ex. the media campaign) • Help with initial connections with outside stakeholders	• Develop team's plans for each Step • Implement the activities for each step of the CAM	• Provide technical assistance and support as needed • Make introductions to stakeholders as needed
Deliverable Completion	• Fill out templates completely • Seek support • Turn in deliverables on time	• *Support PC, if appropriate*	• *See responsibilities at weekly ECL meetings.*	• Provide templates • Support progress • Communicate deadline and submission procedure
Evaluation	• Complete evaluation activities	• Provide feedback	• Provide feedback	• Review submissions

CAM ECL Project Coordinator Expectations

CAM ECL Project Coordinator must be at least 0.8 FTE, which means ~80% (~32 hours per week) of your time will be spent on CAM.

PC WEEKLY EXPECTATIONS:

- [ ] Plan and prepare **at least one ECL meeting per week**. It is recommended that each ECL meeting is at least 1.5 hours long.
- [ ] Meet/check-in with your **Lead ECL/ ECL Assistant at least once a week**, in addition to the ECL meeting.
  - [ ] Sample conversation topics include: assign tasks and responsibilities, review and evaluate previous meetings/ training, set goals and assign roles for the upcoming meeting and training, review deliverables and CAM project next steps (as appropriate), work on professional development, etc.
- [ ] **Plan future ECL workshops** — tailor the curriculum as needed to best fit the needs, interests and capacity of the team you're working with.
- [ ] **Check emails** daily and respond in a timely manner; if you are out of the office, please turn on an out of office message.
- [ ] Check and contribute to project management software (ex. Groupsite, Asana, ClickUp, etc.) at least once a week.

PC ONGOING EXPECTATIONS:

- [ ] Support, train and guide your team in completing plans and activities for each of the Community Action Model steps. This may also mean that you have to do some extra research or connect with outside stakeholders to help your team.
- [ ] Plan and refine future **ECL workshop curricula**; if appropriate, tailor curricula provided by TFP.

- [ ] Complete at least **3 ECL workshop evaluations** per quarter.
- [ ] Attend and prepare for ALL appropriate Funder meetings:
    - [ ] Monthly 1:1 check-ins;
    - [ ] Monthly All CAM Partner meetings; and
- [ ] Quarterly Tobacco-Free Coalition meetings.
- [ ] **Coordinate ECLs** to attend required Funder trainings
- [ ] Work on **CAM deliverables**, reports, and other Funder requirements. Complete and submit these CAM deliverables to the appropriate CAM lead.
- [ ] **Plan ahead** for due dates, deliverables, school breaks, holidays, and other agency assignments/ events.
- [ ] **Keep your ECL team engaged and motivated** by visualizing their progress towards their goal, rewarding successes, and reinforcing lessons learned.

CAM Deliverables & Deadlines

Introduction & FAQs

The Community Action Model deliverables have changed throughout years. However, their purpose of providing guidance and structure for CAM projects to complete each step remains the same. The deliverables are either "Plans" that the CAM teams develop for a specific step or "Progress/Outcome" reports for the CAM team to highlight outcomes, success, and challenges, along with capacity building of Emerging Community Leaders. In addition, there are deliverables, or parts of deliverables, for monitoring, evaluation and quality improvement purposes.

	Plans	Progress or Outcomes	Monitoring & Evaluation
Step 1	• 6 Month ECL Curriculum Plans • Example Workshop		• Pre-ECL and Post-ECL Surveys • ECL Training & Track Tools • 3 Evaluations of Trainings/ Workshops • Progress Reports/Final Reports
Step 2	• Diagnosis Plans- Secondary Research • Diagnosis Plan- Primary Research	• Mid-Year Progress Call • Step 2 Progress Report	
Step 3	• Community Presentation Plan • (part of Diagnosis Analysis Report- Primary Research)	• Diagnosis Analysis Report- Secondary Research • Diagnosis Analysis Report- Primary Research • Presentation Draft	
Step 4	• Action Idea or Rationale • Midwest Academy Strategy Chart • Initial Action Plan & Ideas • Stakeholder Engagement Plan • Media Plan • Demonstration Project Plan	• Mid-Year Progress Call • Educational Packet • Demonstration Project Report • Action Plan Progress Report	
Step 5	• Enforcement or Sustainability Plan (part of Final Report)	• Final Report	

Who are PCs and ECLs, and what are their roles? Who completes the deliverable?

Project Coordinators, or PCs, facilitate team meetings and workshops to generate information and decisions from their Emerging Community Leaders, or ECLs, and complete the deliverables. Lead ECLs are Emerging Community Leaders who may take on more complex tasks that support the Project Coordinator, and build their leadership skills in the process.

Ultimately, CAM Project Coordinators are responsible for completing each of the deliverables. For deliverables that are considered "Plans," like the Diagnosis Plan, we encourage the Project Coordinators to find creative ways to develop their own way of breaking down, organizing and visualizing their plan rather than using the charts and timelines that are provided in the official deliverable.

Project Coordinators do not tend to show the deliverable forms to their ECL team, who may find it overwhelming or feel like "homework." Lead ECLs could support their Project Coordinators in thinking about how to facilitate workshops, planning and decision-making within their team to complete each deliverable.

How set in stone are the deadlines for deliverables?

We know that on one hand challenges, sometimes out of the CAM project's control, show up throughout the CAM cycle, and on the other hand deadlines help keep CAM projects accountable towards completing each step. The SF TFP team tends to be open to extensions of deadlines on an individual basis after organizations discuss with their CAM Staff Lead during one-on-one meetings. Extensions due to staff changes, ECL team transitions or dynamics, and other issues are typically granted. We are also aware that too many deliverables and reports can be burdensome to Project Coordinators, and may even impede the completion of actual CAM project activities.

Developing a deliverable schedule that is purposeful and ensures PCs get enough guidance and motivation to complete CAM project activities is still a growth areas for us. For example, previously in Step 4, there were no deliverables except for the Action Plan Tool for a whole year. We found that this approach made it difficult for Project Coordinator and Funding Agency staff to track and be accountable for completing the tactics identified in the initial Action Plan. In response, we set up a deliverable schedule that was too burdensome. In the end, based on the collaboration and feedback from Project Coordinators, our team developed a more practical and purposeful timeline for Step 4.

What is the purpose of the different Progress and Final Reports?

For each CAM year, we typically have scheduled a Mid-Year Progress report and a Final report for the Project Coordinators to document their successes and challenges as well as provide valuable feedback to the TFP team. These reports are also where we gain qualitative information about the capacity and leadership building of Emerging Community Leaders and Project Coordinators, themselves. During turn over of Project Coordinators or Funding Agency staff, these progress and final reports are often great on-boarding documents to help staff to get up to speed on the project.

We have also found it helpful for the Project Coordinators to document their progress for Steps 2 & 4 when there are 2-3 months with no official deliverables. These progress reports aren't meant to be onerous, but a simple update on activities, so that the Funding Agency can have documentation of the progress for future case studies, lessons learned and more importantly identify ways to support the project. To simplify the process, the PC and the Funding Agency staff could write this up together during a one-on-one meeting or it could be done through a phone call. The progress report is also a reflective exercise for Project Coordinators so that they can identify ways to best address their challenges with their Funding Agency lead.

CAM Deliverables & Deadlines

Year 1: Steps 1–3 example

Step	Community Action Model	Timeline
0	Set up Admin and Program Structure, Hire Project Coordinator & Capacity Building	July
0	Hire and designate a Project Coordinator (PC), PC attends required 2–3 day CAM Orientation	End of July
0	Meet monthly with Tobacco-Free Project staff to review progress on work plan and budget	Ongoing
0	Attend monthly CAM partner meetings, Step-specific trainings, and quarterly Tobacco-Free Coalition meetings	Ongoing
1	Train Emerging Community Leaders (ECLs), Name the Issue and Choose Area of Focus	August–September
1	PC develops ECL training calendar and workshops for August–December & at least 1 workshop on selected focus topic area	August 31st
1	Recruit & Train Emerging Community Leaders, complete: (1) ECL Pre-Survey & (2) Attend ECL Orientation	End of September
2	Define, Design & Do Community Diagnosis	October–mid-March
2	ECL and PC attend Step 2 Diagnosis Training	mid October
2	Design & Submit Diagnosis Plan Part 1: Focus Area and Secondary Research + ECL Tracking and Training tool (August–November)	October 31st
2	Design & Submit Diagnosis Plan: Two Primary Research Activities & Draft Primary Research Tools	December 15th
2	Mid-year Progress Call + ECL Training Plan January–June	December 15th
2	Progress Report for Step 2 Diagnosis Plan + Data Analysis Report, Secondary Research	February 15th
2	Complete all Primary Data Collection	Mid March
3	Analyze and Disseminate Results of Community Diagnosis	mid–March–June
3	ECL and PC attend Step 3 Data Analysis Training	mid–March
3	Diagnosis Analysis Report Part 2: Primary Research & ECL Tracking and Training Tool (December–March)	April 30th
3	ECLs conduct two presentations: one community presentation & CAM Showcase presentation PCs may present to DPH leadership and/or Tobacco-Free Coalition	April – June
3	Submit Final Report, ECL Tracking & Training Tool (April–June), ECL Post-Surveys	June 15th

Year 2: Steps 4 & 5 example

Step	Community Action Model	Date
	Recruit & Train Emerging Community Leaders	July–Sept
0	Hire and designate a Project Coordinator (PC), PC attends required 2-3 day CAM Orientation and other trainings	End of July
0	Meet monthly with Tobacco-Free Project staff to review progress on work plan and budget	Ongoing
0	Attend monthly CAM Partner meetings, Step-specific trainings, and quarterly Tobacco-Free Coalition meetings	Ongoing
1	PC develops ECL Recruitment & Training plan for August- December & 1 workshop to reorient new ECLs	August 31
1	Recruit & Train Emerging Community Leaders, complete: (1) ECL Pre-Survey & (2) Attend ECL Orientation	End of September
4	Action Planning	Oct–Dec
4	2–3 Action Ideas & Rationale, ECL Tracking, Training & Evaluations (August-October)	End of October
4	Midwest Academy Strategy Chart & initial Action Plan: PSE Change, Educational Packet & Endorsement Plan, Media Campaign Ideas, Demonstration Project Ideas, Stakeholder Engagement Ideas	End of November
4	Mid-Year Progress Call, Educational Packet completion & Training Plan January- June	December 15
4	Action Planning & Implementation: Community Education & Demonstration Project	Jan–March
4	Stakeholder Engagement Plan: Engage and Inform 6-8 stakeholders & Demonstration Project Plan	January 31
4	Media Plan: Social and Traditional Media Plan & ECL Tracking, Training & Evaluations (November – February)	February 28
4	Action Implementation: Decision-Makers Engagement & Media Campaign	April–June
4	Action Plan Progress Report: Progress & Outcomes Engaging Stakeholders, Demonstration Project and Media +	April 30
4	Demonstration Project Report	May 15
4	CAM Honoring/Showcase	May
5	Final Report with Enforcement Plan & ECL Tracking, Training & Evaluations (March- June), ECL Post-Surveys	June 14

Deliverables & Deadlines

Submission Instructions: All deliverables are to be emailed by close of business (5PM PST) on the date specified below to the staff. Please send to your staff lead. At least one month prior to the deadline, staff will review and discuss the reporting forms with all CAM project partners during monthly meetings.

Review Process: Staff will review your reports and respond within 3 work days if there are any questions or need for more information. Partners are expected to respond to requests within 3 work days.

Year 1: Steps 1–3

Step	Community Action Model	Timeline
0	Set up Admin and Program Structure, Hire Project Coordinator & Capacity Building	
0	Hire and designate a Project Coordinator (PC), PC attends required 2–3 day CAM Orientation	
0	Meet monthly with Tobacco-Free Project staff to review progress on work plan and budget	
0	Attend monthly CAM partner meetings, Step-specific trainings, and quarterly Tobacco-Free Coalition meetings	
1	Train Emerging Community Leaders (ECLs), Name the Issue and Choose Area of Focus	
1	PC develops ECL training calendar and workshops for August–December & at least 1 workshop on selected focus topic area	
1	Recruit & Train Emerging Community Leaders, complete: (1) ECL Pre-Survey & (2) Attend ECL Orientation	
2	Define, Design & Do Community Diagnosis	

Step	Community Action Model	Timeline
2	ECL and PC attend Step 2 Diagnosis Training	
2	Design & Submit Diagnosis Plan Part 1: Focus Area and Secondary Research + ECL Tracking and Training tool	
2	Design & Submit Diagnosis Plan: Two Primary Research Activities & Draft Primary Research Tools	
2	Mid-year Progress Call + ECL Training Plan January–June	
2	Progress Report for Step 2 Diagnosis Plan + Data Analysis Report, Secondary Research	
2	Complete all Primary Data Collection	
3	Analyze and Disseminate Results of Community Diagnosis	
3	ECL and PC attend Step 3 Data Analysis Training	
3	Diagnosis Analysis Report Part 2: Primary Research & ECL Tracking and Training Tool	
3	ECLs conduct two presentations: one community presentation & CAM Showcase presentation PCs may present to DPH leadership and/or Tobacco-Free Coalition	
3	Submit Final Report, ECL Tracking & Training Tool, ECL Post-Surveys	

Year 2: Steps 4 & 5

Step	Community Action Model	Date
	Recruit & Train Emerging Community Leaders	
0	Hire and designate a Project Coordinator (PC), PC attends required 2-3 day CAM Orientation and other trainings	
0	Meet monthly with Tobacco-Free Project staff to review progress on work plan and budget	
0	Attend monthly CAM Partner meetings, Step-specific trainings, and quarterly Tobacco-Free Coalition meetings	
1	PC develops ECL Recruitment & Training plan for August- December & 1 workshop to reorient new ECLs	
1	Recruit & Train Emerging Community Leaders, complete: (1) ECL Pre-Survey & (2) Attend ECL Orientation	
4	Action Planning	
4	2-3 Action Ideas & Rationale, ECL Tracking, Training & Evaluations	
4	Midwest Academy Strategy Chart & initial Action Plan: PSE Change, Educational Packet & Endorsement Plan, Media Campaign Ideas, Demonstration Project Ideas, Stakeholder Engagement Ideas	
4	Mid-Year Progress Call, Educational Packet completion & Training Plan January- June	
4	Action Planning & Implementation: Community Education & Demonstration Project	
4	Stakeholder Engagement Plan: Engage and Inform 6–8 stakeholders & Demonstration Project Plan	
4	Media Plan: Social and Traditional Media Plan & ECL Tracking, Training & Evaluations	
4	Action Implementation: Decision-Makers Engagement & Media Campaign	
4	Action Plan Progress Report: Progress & Outcomes Engaging Stakeholders, Demonstration Project and Media +	

4	Demonstration Project Report	
4	CAM Honoring/Showcase	
5	Final Report with Enforcement Plan & ECL Tracking, Training & Evaluations, ECL Post-Surveys	

ECL Training Plan, Steps 1, 2, 3

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Submit this to your CAM Staff Lead by end of day (5PM). If you have any questions prior to the deadline, please feel free to call or email. We are more than happy to support you in completing this deliverable.

Instructions:

Skill and leadership development for Emerging Community Leaders is one of the most important goals of the Community Action Model. As the Project Coordinator for your CAM project, your role is to facilitate and support your ECLs in learning new skills and providing opportunities for them to take the lead in decision-making and implementing your project's activities. Creating a training and workshop plan is crucial to ensuring that your ECLs will grow, learn and apply their new skills, as well as help you to complete each deliverable of the CAM. This ECL Training Plan will act as guide for you to develop and schedule your workshops for your CAM team.

For each week between, fill out the training topic, date, time and learning objectives of each training.

Training Topic:

- Plug in the required trainings in the menu of training, including *Funder*-led training
- Use the menu of recommended trainings and CAM Step 4–5 General Timeline

- You do not need to schedule a formal training presentation EVERY week-you may need time to do the work of CAM such as scheduling meetings, recruiting survey participants, conducting focus groups, finalizing educational packet, implementing your Demonstration Project, meeting with stakeholders, etc.
- Don't forget to add other trainings that support ECL's leadership development and growth not directly related to CAM project and deliverables, such as organization-specific trainings, other social justice issues, college applications, resume writing, team building, and outings, etc.
- Include holidays when your ECL team may not meet.

Time:
You are required to meet weekly for at least 1.5 hours with your ECL team

Learning Objectives:

- Include 1–2 learning objectives per training
- Learning objectives state the skill or knowledge you want your ECL teams to come away with at the end of the training

Examples:

- Define and differentiate Policy-System-Environmental Change, Action and Tactics
- Create a social-media plan for media campaign
- Discuss and develop Demonstration Project ideas

Required Training for ECLs — Example	Trainer	Timing
Overview of CAM Steps	Project Coordinator	July–August
CAM Specific Topic Area	Project Coordinator	July–August
Step 1 Training: ECL Orientation	**Tobacco-Free Project**	**September/October**
Public Health and Health Equity 101	Project Coordinators	September/October
Tobacco and Social Justice	Project Coordinator	September–October
Local Tobacco Policies, System & Environmental Changes	Project Coordinator	September–October
Step 2 Training: Diagnosis and Research Methods 101	**Tobacco-Free Project**	**October**
Developing research plans	Project Coordinator	October–November
Conducting secondary research activities: Literature Review, PSE Review & Stakeholders/Decision–Makes	Project Coordinator	October–November
Conducting primary research activities	Project Coordinator	November–December
Developing and Conducting Key informant Interviews	Project Coordinator	December–January
Developing and conducting selected primary data collection activities	Project Coordinator	January–March

Required Training for ECLs — Example

	Trainer	Timing
Step 3 Training: Visualizing and Messaging Key Findings	**Tobacco-Free Project**	**March**
Analyzing Quantitative Data	Project Coordinator	March–April
Analyzing Qualitative Data	Project Coordinator	March–April
Creating visuals (charts, infographics, etc.) of key findings	Project Coordinator	April–May
Planning and Doing a Presentation	Project Coordinator	April–May
Step 3 Findings Showcase Presentation	**Tobacco-Free Project**	**May–June**

Recommended Trainings

- Co-create team norms, agreements and decision-making process
- Discuss history, strategies and wins of community organizing
- Researching and reading local policies
- How to research local elected officials and decision-makers
- Using Survey Monkey, Google Forms and other online survey platforms
- Using social math
- Practice public speaking and presentation skills
- Develop effective presentations
- Attend, observe and reflect on public hearing processes in your jurisdiction
- Comprehend how policies and decisions are made in your jurisdiction

Required Training for ECLs	Trainer	Timing
Overview of CAM Steps		
CAM Specific Topic Area		
Step 1 Training: ECL Orientation		
Public Health and Health Equity 101		
Tobacco and Social Justice		
Local Tobacco Policies, System & Environmental Changes		
Step 2 Training: Diagnosis and Research Methods 101		
Developing research plans		
Conducting secondary research activities: Literature Review, PSE Review & Stakeholders/Decision–Makes		
Conducting primary research activities		
Developing and Conducting Key informant Interviews		
Developing and conducting selected primary data collection activities		

Required Training for ECLs

Required Training for ECLs	Trainer	Timing
Step 3 Training: Visualizing and Messaging Key Findings		
Analyzing Quantitative Data		
Analyzing Qualitative Data		
Creating visuals (charts, infographics, etc.) of key findings		
Planning and Doing a Presentation		
Step 3 Findings Showcase Presentation		

Recommended Trainings

- Co-create team norms, agreements and decision-making
- Discuss history, strategies and wins of community organizing
- Researching and reading local policies
- How to research local elected officials and decision-makers
- Using Survey Monkey, Google Forms and other online survey platforms
- Using social math
- Practice public speaking and presentation skills
- Develop effective presentations
- Attend, observe and reflect on public hearing processes in San Francisco
- Comprehend how policies and decisions are made in San Francisco

Define & Design a Community Diagnosis Tool

Secondary Research

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Submit this to your CAM Staff Lead by end of day (5PM). If you have any questions prior to the deadline, please feel free to call or email. We are more than happy to support you in completing this deliverable.

Instructions:

This month, you will be leading your team in completing the first parts of Step 2: Define & Design a Community Diagnosis. During this planning time, you will be defining your CAM focus area and DESIGNING how you will be conducting your research. Spending time to develop a plan will help ensure that your team has adequate knowledge and time to collect data and information about your CAM topic. These charts will be the final product of your planning time and will guide your team in completing the rest of CAM Step 2: Community Diagnosis.

First, your team will be planning and completing your initial secondary research phase, or reviewing existing information about your topic, including research, Policy-System-Environmental changes, stakeholder and decision-makers. Then, based on your learnings your team will be planning and completing your primary research phase to complete Step 2. We recommend creating mini-teams within your ECL team that will take on parts of, or separate research activities (for example, one mini-team researches the past policies, while another researches a decision-maker). This allows for more leadership opportunities and decision-making for your ECLs. Your Lead ECL can also step up by being a lead on at least one of the research teams.

Oct - Dec: Secondary Research
(2 months)

- Review of Existing Data & Research (Literature Review)*
- Review of Existing Policies, System, and Environmental Changes*
- Background research of relevant stakeholders and decision-makers*

Dec-March: Primary Research
(2-3 months)

- Key Informant Interviews
- Focus Groups
- Photovoice
- Observations
- Community Mapping

*Required activities

Please refer to the Step 2 Guidebook (page 389) for examples of how to lead your CAM team in completing this Define & Design a Community Diagnosis tool as well as how to conduct the various types of research activities. Project Coordinators are ultimately accountable for completing this tool. We do not recommend ECLs completing these charts themselves, but for the Project Coordinator to guide the ECLs through series of workshops and trainings that will gather the information needed to fill out these charts.

For this Step 2: Secondary Research Plan Deliverable:

- ☐ Complete Define Diagnosis Table (following)
- ☐ Complete Diagnosis Plan & Timeline Table for Secondary Research.
  - ☐ Existing Data and Research, otherwise known as a Literature Review
  - ☐ Existing Policy-System-Environmental Changes related to your Issue
  - ☐ Stakeholders & Decision-Maker List
- ☐ Review the Primary Research Summary Tables to help your team summarize your findings

Define Diagnosis Table

Community Focus Area is a problem statement that narrows down your CAM topic to a specific issue and identifies who is being most impacted. The statement answers the “Who” and “What”

The Rationale explains "Why" this is a health equity or social justice issue. The rationale may also describe why this issue matters to your team.

Policy-System-Environmental Change (PSE) addresses health issues at a level that can help communities achieve optimal potential for health.

- **Policy:** Written statement of organization, position, decision or course of action, such as local law or ordinance, state law, agency or institution guidelines, mandates, etc.
- **System:** Changes in organizational procedures, such as resources, personnel and programs
- **Environmental:** physical, observable changes in the built, economic or social environment, such as streets, partnerships or funding allocations.

Your CAM PSE Option must be:

1. Achievable
2. Create long-term or sustainable change
3. Compels a decision-making body to create a P-S-E Change

Example:

Community Focus Area What is the specific issue your team will be addressing? Who does it impact?	More stores sell tobacco in some San Francisco neighborhoods than others, especially in neighborhoods with more low- income communities of color.
Rationale for Focus Area: Why does your team care about this issue? Why is this issue important to your community? How is it a social justice or health equity issue?	More low-income, communities of color may smoke because they are more exposed to tobacco advertisement and have easier access to tobacco products due to the higher concentration of stores that sell tobacco. This may result in poorer health outcomes for our communities, such as lung cancer and heart disease, in comparison to wealthier or white communities in San Francisco. As a CAM team who represent communities of color, we want to protect the health of our families and neighbors.
Policy-System-Environmental Change Option: What Policy-System-Environmental change solution is your team considering for this issue?	A city policy that will limit the number of permits for stores to sell tobacco products per neighborhood or district.

Community Focus Area What is the specific issue your team will be addressing? Who does it impact?	
Rationale for Focus Area: Why does your team care about this issue? Why is this issue important to your community? How is it a social justice or health equity issue?	
Policy-System-Environmental Change Option: What Policy-System-Environmental change solution is your team considering for this issue?	

Design Diagnosis Charts, Secondary Research

See example of filled out chart at the end.

Secondary Research, Activity 1

Conduct a review of existing research and data on your issue of concern. Read and review research papers, reports, and other sources of data that already exist to give your team base knowledge of what is already known about the issue. Plan to review at least 3–4 studies or other sources of data that already exist.

Research Activity #1:	Review Existing Data & Research
3–5 Research Questions What questions could you ask to help you understand your issue, how it impacts your community, the potential P-S-E solutions, and who will support or oppose your solution?	

Timeline Provide projected timeline for each research step.	**Research Steps:** For each research activity, what steps need to be taken to complete the research? Use the research tool kits to help identify each step you may take.

Secondary Research, Activity 2: Existing P-S-E

Conduct an Existing Policy-System-Environmental Review, including:

Assess existing strategies:

- Existing tobacco related policies, systems and environmental changes that could impact the issue of concern/problem. Include local, state, or national policies in your research.
- General policies that may be transferable to the issues(s) of concern. Include local, state or national policies in your research. For example, looking at alcohol outlet density policies that might be transferable to tobacco outlet density policies.

Research Activity #2:	Review Existing Data & Research
3–5 Research Questions What questions could you ask to help you understand your issue, how it impacts your community, the potential P-S-E solutions, and who will support or oppose your solution?	

Timeline Provide projected timeline for each research step.	**Research Steps:** For each research activity, what steps need to be taken to complete the research? Use the research tool kits to help identify each step you may take.

Secondary Research, Activity 3: Decision Makers

- **Compile a list of at least 3 decision-makers or leaders who could champion or oppose your issue.** Decision-makers can be part of local government, agencies, or other organizations. For each decision-maker on the list, research the process/mechanism by which they can adopt a policy, system or environmental change.
- **Compile a list of at least 5 key leadership, city departments, organizations, residents/community members and other stakeholders** who would be impacted by the policy, system or environmental change.

Research Activity #3:	Review Existing Data & Research
3–5 Research Questions What questions could you ask to help you understand your issue, how it impacts your community, the potential P-S-E solutions, and who will support or oppose your solution?	

Timeline Provide projected timeline for each research step.	**Research Steps:** For each research activity, what steps need to be taken to complete the research? Use the research tool kits to help identify each step you may take.

Define & Design a Community Diagnosis Tool
Primary Research

ORGANIZATION: ____

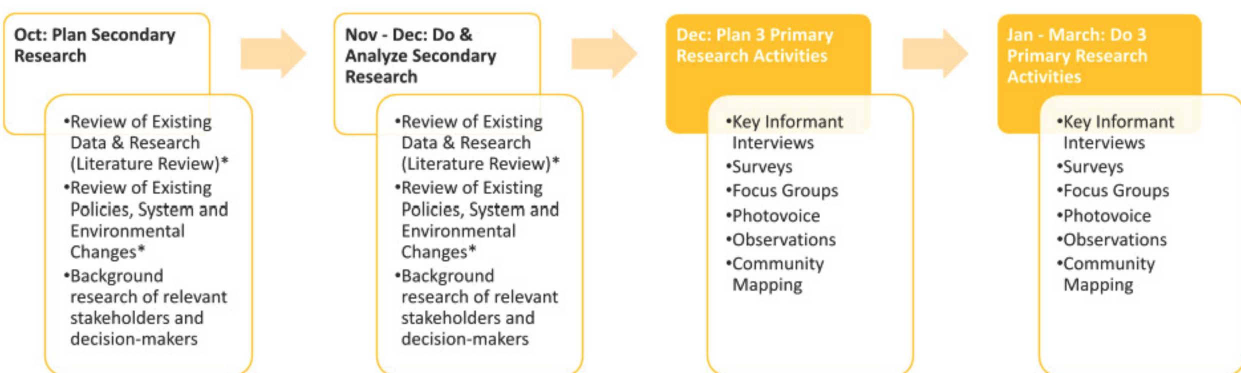
PROJECT: ____

DUE DATE: ____

Submit this to your CAM Staff Lead. If you have any questions prior to the deadline, please feel free to call or email. We are more than happy to support you in completing this deliverable.

Instructions:
Based on your team's findings from secondary research, your team will be completing Step 2: DEFINE & DESIGN a Community Diagnosis- PRIMARY RESEARCH. During this planning time, you will be DESIGNING how you will be conducting your primary research. Spending time to develop a plan will help ensure that your team has adequate knowledge and time to collect data and information about your CAM topic. These charts will be the final product of your planning time and will guide your team in completing the rest of CAM Step: Do Community Diagnosis.

*Required activities



For this Step 2: Secondary Research Plan Deliverable

Develop a plan to conduct primary research related to those who are impacted by the issue or involved in the passage of a specific policy, system or environmental change that addresses the selected issue of concern/problem. Please include:

- What residents/community members think about the issue and the potential policy, system or environmental change.
- What other stakeholders think about the policy, system or environmental change.

Complete at least THREE Primary Research Activities:

1. Key informant interviews with community leaders, decision-makers, and other stakeholders.
2. Survey of residents/community members, decision-makers or stakeholders.
3. Focus group discussion of residents, community members, or stakeholders.
4. Community mapping with community members to map institutions, businesses, agencies, organizations, associations and policy-making bodies that would be impacted or may be influential in getting creating the policy-system or environmental change
5. Photovoice that captures community perspective and feelings about the issue or the Policy-System or Environmental Change they want to see
6. Direct observation and counting of objects of interest (ex. advertisement, smokers, stores, etc.)

Include the following steps for each of the of Research Activity types below:

- Surveys: (1) Survey question development, (2) Target sample size and population, (3) Recruitment strategy, (4) Data analysis methods
- Interviews: (1) Interview Guide development, (2) Informant selection strategy and size, (3) Data analysis methods

- Focus Groups/Community Mapping: (1) Focus Group Guide or community mapping Guide development, (2) Recruitment and sampling strategy, (3) Data Analysis methods
- Observations: (1) Geography or place of observations, (2) Method to counting or observing things or people

Incorporate Time for Review & Pre-Testing

- Project Evaluator and the funder CAM Staff Lead will review surveys, interview and focus group protocols and tools
- Pre-test surveys, interview and focus group protocols with members of the target population

Protocol and Tools Development Guidelines

- **Language Accessibility:** Surveys should be available in multiple languages as appropriate. If multiple languages are offered, the survey or interview/ focus group protocol should include a question on preferred language for data collection method.
- **Assess Community Support:** Surveys, interview and focus group protocols should include questions that assess community support for potential proposed PSE change or Actions.
- **Representation:** When determining the target population for surveys, interviews or focus groups **at least 50% of survey data collected** should reflect the constituency of decision-making body.
    - Ex. If you are targeting a specific member of the Board of Supervisors, surveys should be collected of people who live in the Supervisors district.
    - Ex. If you are targeting a board member of an organization, members or clients of that organization should be surveyed

Please refer to the page 389 for examples of how to lead your CAM team in completing this Define & Design a Community Diagnosis tool as well as how to conduct the various types of research activities. Project Coordinators are ultimately accountable for completing this tool. We do not recommend ECLs completing these charts themselves, but for the Project Coordinator to guide the ECLs through series of workshops and trainings that will gather the information needed to fill out these charts.

Primary Research Activity #1	
Target Audience Who will you be collecting primary research data from?	
3–5 Research Questions What questions could you ask to help you understand your issue, how it impacts your community, the potential P-S-E solutions, and who will support or oppose your solution?	

Timeline Provide projected timeline for each research step.	**Research Steps:** For each research activity, what steps need to be taken to complete the research? Use the research tool kits to help identify each step you may take.

Primary Research Activity #2	
Target Audience Who will you be collecting primary research data from?)	
3–5 Research Questions What questions could you ask to help you understand your issue, how it impacts your community, the potential P-S-E solutions, and who will support or oppose your solution?	

Timeline Provide projected timeline for each research step.	**Research Steps:** For each research activity, what steps need to be taken to complete the research? Use the research tool kits to help identify each step you may take.

Primary Research Activity #3	
Target Audience Who will you be collecting primary research data from?	
3–5 Research Questions What questions could you ask to help you understand your issue, how it impacts your community, the potential P-S-E solutions, and who will support or oppose your solution?	

Timeline Provide projected timeline for each research step.	**Research Steps:** For each research activity, what steps need to be taken to complete the research? Use the research tool kits to help identify each step you may take.

Example:

Primary Research Activity #1	**Resident Survey**
Target Audience *Who will you be collecting primary research data from?*	200 community residents, mainly adults, living in Supervisorial District 6 (Tenderloin & SOMA)
3–5 Research Questions What questions could you ask to help you understand your issue, how it impacts your community, the potential P-S-E solutions, and who will support or oppose your solution?	1. Where do residents typically go to buy food and other items like tobacco, alcohol, and drinks? 2. What are residents opinions about the issue of tobacco products and advertisements and its impact on health of their community, especially on young people? 3. How close is the nearest tobacco retail store to their home, school or community space? 4. What do residents think about the number and density of stores that sell tobacco and unhealthy products in their community? 5. What do residents think of the solution of limiting the number of permits to sell tobacco per district?
Timeline Provide projected timeline for each research step. Remember all research must be complete by Feb 28, 2018.	**Research Steps:** For each research activity, what steps need to be taken to complete the research? Use the research tool kits to help identify each step you may take.
12/6/2017	CAM team starts developing a draft list of survey questions based off of our research questions, share with TFP team and Bright Research Group for review. CAM team will also decide on dates when and where they want to go out to conduct the survey, each team member has a goal of collecting 30 surveys each. **Recruitment Strategy:** Teams will focus on conduct surveys at community events, libraries, schools, community centers, and busy streets in the area. They will approach every 3rd person to ask if they want to complete a short survey, and the survey will include the screening question of if they live in this neighborhood.
12/13/2017	CAM team reviews feedback from TFP team/BRG and creates a final draft survey to pilot. CAM team practices conducting the survey on other young adults or staff at the youth organization to get their feedback on the survey tool as a way to pilot the tool. Project Coordinator and team will discuss feedback and make any changes; PC will send final draft to TFP to approve. Team will also debrief experience on conducting surveys with other people and how to improve. They will create a “cheat sheet” of bullet points of how to conduct a good survey.

Define & Design a Community Diagnosis

Progress Report

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Submit this to your CAM Staff Lead by end of day (5PM). If you have any questions prior to the deadline, please feel free to call or email. We are more than happy to support you in completing this deliverable.

Instructions:

Please fill out the following table that describes your progress, success, and challenges for each of the research activities your CAM ECL team has planned for Step 2. Please read the instructions below for specific details on how to complete each column.

Status:

- If Complete: Insert completion date and green check mark: √
- If In Progress: Provide projected completion date and yellow arrow: →
- If Not Started: Provide projected/planned completion date and red: X

Successes: Please describe in 5–8 sentences your ECL team's progress on this research activity highlighting key successes (ex. ECL involvement/participation, accomplishments, etc.) and learnings you are having as a Project Coordinator.

Challenges: Please describe in 5–8 sentences any challenges or barriers your ECL team is having or had in completing this research activity. Please highlight any challenges with trainings, ECLs engagement and participation in the activity, and/or barriers in data collection and recruitment of community or stakeholder participants. Please also describe how you are working towards overcoming these challenges.

Example:

Step 2 Diagnosis Plan Progress Report	Status	Successes	Challenges
Literature Review	12/15	Our team completed the literature review as the first step in our Diagnosis plan to gain background understanding about the issue of healthy food access, particularly in low-income urban neighborhoods like ours. To complete the literature review, each ECL was assigned to find 2-3 credible sources that answered their chosen research question. To help them in their online search, I provided a training on identifying search terms and credible sources. Each person filled out 1-2 key findings per report, journal article or website they read and reviewed in the literature summary table and presented it back to the team. For some of the ECLs, this was the first time they have completed online research on this issue and expressed that they gained a lot of information about the issue, especially the inequitable access to food in San Francisco and for communities like ours.	One of our main challenges was to find research that was specific to our neighborhood, the Bayview, on healthy food access. However, we reached out to Jessica and she pointed out some key resources, such as the Healthy Stores for Healthy Communities data which provided recent data on types of food available in the Bayview. Some of the ECLs found this research a little bit boring, and like homework, and had a hard time summing up their key findings. To address this, I made this into a game in which each person presented their findings, if someone had the same finding that resulted in zero points for each person. If someone presented a new and different finding then it was one point. The winner received a gift card! We had an outside staff be the judge of the credibility and uniqueness of finding.
Existing Policy-System-Environmental Change Review	1/13/18	To complete this part of the Diagnosis plan, I compiled and printed out the existing Healthy Retail SF Ordinance and summary of federal SNAP and WIC policies for our ECLs to review. We had a discussion about these programs and how our communities' access to food are impacted by these policies and programs. ECLs shared about their experience being on SNAP/WIC. To learn more about the impact of the HRSF policy we toured a healthy retail store, Friendly's, in our neighborhood and compared it to another non-HRSF store: A&J liquor store. As a follow up to this conversation, we brainstormed a list of stakeholders that are impacted by the issue or can use their power/voice to improve access to healthy foods in our community. I provided a list of categories (ex. community organizations, city officials, city agencies, etc.) for them to come up with specific partners in our community. We then discussed why they would care about improving food access or want to support our project. This led to a lively discussion on who on our team is connected or know about the organization or stakeholder.	I had a hard time figuring out how to make the PSE review interesting, approachable and relevant to the group. I thought it would be hard for our high school students to figure out what policies dictate food access for our community, so I thought it would be best to do the initial research myself and then provide them with the background information or summaries of the policies to respond to. Most importantly, I wanted to make sure that we talk about how these policies/programs impact our daily lives and how we access food so that it would be more relevant to our team. Some of our ECLs did share about how difficult it was for their families to utilize SNAP and for others it was the first time that the idea that a policy can shape our daily lives clicked.

Informational Meetings	1/4/18	At the beginning of Step 2, our team already knew we wanted to talk to Healthy Retail SF to learn more about the program. We also wanted to talk to the lead organizer at the Tenderloin Healthy Corner Store Coalition to learn about community-led initiatives. The ECLs utilized the research questions we came up with to ask Jessica at HRSF and Ryan at TLHCSC. I set up the appointments with Jessica and Ryan in advance knowing that this would be helpful for our team to learn more about what's going on in SF. The ECLs took notes and reflected about what insights they gained from the informational interviews in a journal assignment.	Since food access is a new topic that the ECLs are learning about, I took the initiative to share with them about various community stakeholders and programs in San Francisco related to the issue during Step 1. However, I still wanted to make sure that our team was involved in identifying who to talk to for these short informational interviews. The ECL team voted on who they wanted to talk to based on criteria we came up with on which stakeholders would provide us with valuable background information. I'm learning how to balance providing guidance and also giving the ECLs voice in decision-making.
Primary Research 1: Conduct 200 surveys on healthy food access with residents in the Bayview	2/23/18	We just started developing the survey questions for the survey tool, and have it in draft form. I reached out to the Evaluator and CAM Staff Lead to get their feedback and approval before we start administering it. Meanwhile, the ECLs that are that are taking the lead on conducting surveys – Team Survey!—are coming up with a protocol and script as well as locations for people to sign up to conduct surveys at. A few locations include the library, YMCA, and schools. We will spend most of February collecting the surveys, and each of the ECLs have a goal of completing 20 surveys.	The Survey Team's main challenge was developing the survey tool and the order of the questions. They also had about 15 questions they wanted to ask so it was hard to narrow it down to 10. To refine the survey, they had the rest of the team take the survey and reflect and provide feedback on what questions were important and what order made more sense.
Primary Research 2 (Implementation Only): 3–4 Key Informant interviews with stakeholders regarding healthy food access	2/9/18	Team Interview has identified 5 people they want to interview based on the stakeholder list we developed in the PSE review. Once they decided this, I started reaching out scheduling interviews for the team. The interview guide was developed, reviewed and approved by the Evaluator and CAM Staff Lead. Our team practiced the interviewing through a role play workshops with Bright Research Group at the end of January. The first interview was completed January 18th with Friendly Market store owner after we did a tour of the store. We have two more scheduled: —James Brown the health and wellness coordinator at the Bayview YMCA —Gina Yee of the Food Security Task Force	The ECLs on the Interview team were nervous about interviewing and talking to adults about the issue. One of the ECLs expressed that he was shy and did not want to do any talking. We spent some time talking about their experiences with people in power, ageism and how they impacts their confidence and agency as young people. Then, we did a practice interview with another staff at our organization with who most of the ECLs do not have a lot of interaction. This helped ease their nerves because it was still within our organization rather than totally outside of their comfort zone. We also designated different roles for the Interview team and rotated for each interview so that they gained experience and confidence.

Primary Research 3 (Implementation Only): 3–4 retail store assessments in the neighborhood	2/28/18	We reviewed through previous store assessment survey questions as a team.	The two ECLs who are in charge of working on this have been very busy and haven't been at a meeting for the last two weeks. Prior to this, we did look at the store observation surveys from previous Healthy Retail SF work and circled the questions the team was interested in. I am hoping to follow up with the 2 ECLs to check-in about anything that is going on in their lives or school that is making it difficult for them to show up. Also, I am hoping to make this more of a full team effort so it may be that we find a weekend time to work on this part of the assessment.

Step 2 Diagnosis Plan Progress Report	Status	Successes	Challenges
Literature Review			
Existing Policy-System-Environmental Change Review			
Informational Meetings			

Step 2 Diagnosis Plan Progress Report	Status	Successes	Challenges
Primary Research 1:			
Primary Research 2			
Primary Research 3			

Secondary Research Findings

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Submit this to your CAM Staff Lead. If you have any questions prior to the deadline, please feel free to call or email. We are more than happy to support you in completing this deliverable.

Instructions

Fill out the summary table on page 101 that summarizes your key findings for the three (3) secondary research activities and explain how your team completed the activities.

Fill out the data findings table for each of the three (3) secondary activities:

1. Review of Existing Data & Research (Literature Review
2. Review of Existing Policy-System and Environmental Change (PSE Review)
3. Stakeholder & Decision-Maker Research5

Table 1. Secondary Research Summary Instructions

- **Methodology Column:** Often the plan you develop from your Diagnosis tool doesn't go exactly how your team imagined. Please share with us in a narrative format how your team conducted and analyzed the community diagnosis, highlighting how the ECLs were involved.
- **Top 3–5 Findings:** From your team's perspective, what were the top 3–5 findings from your research for each diagnosis activity?

Diagnosis Activity	Methods (5–7 sentences) How did your ECL team conduct and analyze this Diagnosis activity? Highlight how ECLs were involved in planning and completion activities.	Top 3–5 Findings
Review of Existing Data & Research (Literature Review)		
Existing Policy-System-Environmental Review (PSE Review)		
Decision-maker & Stakeholder Research		

Review of Existing Data & Research (Literature Review) Data Findings

Article/Report Ex. Electronic Cigarette Fact Sheet			
Citation/Source Ex. sanfranciscotobaccofreeproject.org/ electronic-cigarettes/			
Relevant Research Question Ex. • What are the harms of electronic cigarettes? • What's in an electronic cigarettes? • What is youth usage of e-cigarettes			
Key Facts Ex. Electronic cigarettes emit aerosol that often contains nicotine, ultrafine particles and low levels of toxins, introducing new pollutants into the air National Youth Tobacco Survey by the Centers for Disease Control and Prevention (CDC), in 2013, 263,000 teens had used e-cigarettes but had never smoked traditional cigarettes. This represents a 3-fold increase from the 79,000 young people reported in 2011.			

Review of Existing Policy-System-Environmental Data Findings

Existing Policy-System-Environmental Change	
Specific Jurisdiction (City, County or Federal)	
How does it relate to your issue?	
Existing Policy-System-Environmental Change	
Specific Jurisdiction (City, County or Federal)	
How does it relate to your issue?	

Decision-Maker & Stakeholder Review

Decision-Maker *Specify which elected official, city agency staff, community organization director, manager of a property etc. who can enact your proposed Policy-System-Environmental change (PSE)*	
Why would they care about your issue or the Policy-System-Environmental change you are proposing?	
What process would they need to complete to support your PSE?	

Stakeholder Specify the community leader, community organization, type of community member, city agency, other institution and businesses that may support, oppose or be impacted by your proposed PSE.	
Contact Information	
Why would they care about your issue or the Policy-System-Environmental change you are proposing?	
How will you engage them to support or help your CAM project?	

Year 1 Final Report

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Submit this to your CAM Staff Lead by the end of day (5PM). If you have any questions prior to the deadline, please feel free to call or email. We are more than happy to support you in completing this deliverable.

Instructions

The CAM model has two intertwined yet distinct goals: (1) to create social change at the Policy-System-Environmental level and (2) to build community capacity. The final report is where you get to describe and share about how your organization's CAM project accomplished those goals. This report helps to support investment in the CAM project. Your insights are essential to continuing our improvement of the process as well as continued investment in the community through CAM.

The final report has 4 parts:

- Table 1. Community Presentation Summary
- Table 2. Emerging Community Leader (ECL) Leadership and Skill Development
- Table 3. Project Coordinator Leadership and Skill Development
- Table 4. Community Action Model Close-Out Questions

The following are also due as part of your final report submission:

- ECL Tracking & Training Tool + Scanned copies of 3 training evaluations
- ECL Post-surveys: https://www.surveymonkey.com/r/POSTCAMECLSurvey2023

Table 1:
Community Presentation Summary

In Step 3, your team is required to conduct two presentations on your findings to inform, educate and engage community members and stakeholders. The presentations include:

- The Community Action Model Showcase supported by the Tobacco-Free Project staff, and
- A community presentation your team organizes on your own.

Fill out this table to summarize the process and outcome of the community presentation organized by you and your team. Please write 4–5 sentences per question. Please attach your final draft of your community presentation and any community results/feedback you collected.

Who was the audience of the presentation?
How many people attended the presentation?
When was the presentation? (Time & Date)

Where was the presentation held? Why did your team choose this location?

What roles did the ECLs have in the community meeting and presentation? (organizing, developing materials, doing the presentation, etc.)

What role did you (the Project Coordinator) have?

How did your team encourage community feedback and engagement with participants?

Summarize the feedback and response of the participants to your CAM presentation. (6–8 sentences)

If your team is moving on to Step 4, how will you integrate the feedback and response of the participants to your campaign tactics? (6–8 sentences)

Table 2:

Emerging Community Leaders Leadership & Skill Development

We want to know more about the ways your Emerging Community Leaders' capacity and skills have grown through participating in the CAM project. Please write 4–5 sentences per each question, and be as specific as you can.

Tell us two stories that show how your Emerging Community Leaders have grown in their leadership, skills and knowledge during Step 3: Analysis and Dissemination of Community Diagnosis.
Story 1:

Story 2:

What are some key skills and knowledge the Emerging Community Leaders on your team gained throughout their participation in CAM Step 1–3 that will be useful beyond the CAM project? (Ex. Surveying, public speaking, presentation development, etc.)

What are some specific soft skills or leadership skills/attributes your Emerging Community Leaders gained that will be useful beyond the CAM project? (Ex. team work, planning projects, confidence, etc.)

Table 3:

Project Coordinator Leadership and Skill Development

We want to know about how you supported your ECLs in leadership and skill development as well as your own professional development as part of the CAM. Please write 4–5 sentences per question.

Describe one workshop or activity that *you* developed, and conducted with your ECLs, that was especially successful. What aspects of the workshop made it successful?

Describe one workshop or activity you developed and conducted with your ECLs that was challenging or was not received well. How did you address and overcome this challenge with your ECLs? What would you do differently if you had to lead this workshop again?

What are other strategies, activities and/or ways that you supported your ECL team and individuals' wellbeing, leadership and skill development throughout the CAM?

Describe the ways you, as a Project Coordinator have grown in your leadership, skills, knowledge and resources throughout your participation in CAM, Steps 1–3 as it applies to you. Please indicate the time frame that you were a Project Coordinator with CAM.

Table 4:
Community Action Model Close-Out Questions

Describe your agency's strategies to engage and retain Emerging Community Leaders. What are some ways you considered culture and language in engaging and retaining Emerging Community Leaders? What were some of the most effective strategies?

How has participating in the CAM project impacted your organization's desire and capacity to engage in developing community leaders in community health?

If applicable, how will your organization integrate resources, trainings and values (such as popular education, health equity, etc.) of CAM into your organizations programmatic strategies and values?

What are some ways that the CAM Funder team can support different CAM grantees in collaborating, building relationships and/or working together?

Provide at least two recommendations for the CAM Funder team to help improve TFP CAM projects in the future below:

Community Diagnosis Analysis Report & Community Presentation Plan

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Submit this to your CAM Staff Lead by the end of day (5PM). If you have any questions prior to the deadline, please feel free to call or email. We are more than happy to support you in completing this deliverable.

Instructions

Through Step 2 and part of 3, your team has DEFINED, DESIGNED, CONDUCTED, and ANALYZED your community diagnosis on your topic area. The next part of Step 3 is for your ECL team to disseminate or share your team's key findings from your Community Diagnosis in a community meeting and at the Community Action Model Showcase.

The Step 3 Community Diagnosis Analysis Report includes:

1. Table 1. Diagnosis Summary (Page 129)
2. Table 2. Community Presentation Plan (Page 132)

Please complete each table as part of your Step 3 Community Diagnosis Analysis Report & Community Presentation Plan, and make sure to include the following checklist of required attachments in your submission:

Data Collection Tools for Primary Research (ex. Survey Tool, Key Informant Interview Guide, Focus Group Guide, Observation Tool, Photovoice Protocol)

☐ Raw Data Collected (ex. Focus Group/KII- Notes Table, Surveys-Excel and Summary Report, Photovoice- Photos and Narratives)

- [ ] Data Summary Table for Surveys and Observations or Theme Summary Table for Focus Groups, Key Informant Interviews and Photovoice
- [ ] Community Presentation Slide Deck for the CAM Showcase

Table 1. Diagnosis Summary Instructions (See page 128 for an example)

- **Diagnosis Activity Column:** Insert the description of the activity from your diagnosis plan.
- **Methodology Column:** Often the plan you develop from your Diagnosis tool doesn't go exactly how your team imagined. Please share with us in a narrative format how your team conducted and analyzed the community diagnosis, highlighting how the ECLs were involved. For each type of research please touch upon:

Research Activity

Please Summarize each Research Activity in 10–15 sentences:

Surveys	1. How did your team develop the survey? 2. Who did your team intend to survey? Who did your team end up surveying? 3. How did your team conduct the survey? What roles did your ECLs have? 4. How many surveys did you conduct? 5. How did your team analyze the data?

Interviews	1. How did your team develop the key informant guide? 2. Whom did your team interview? 3. How did your team conduct the interviews? What roles did the ECLs have? 4. How did your team analyze the data?

Focus Group Discussions	1. How did your team develop the focus group guide? 2. How many focus groups did you conduct? With whom? 3. How did you recruit your focus group participants? 4. What roles did your ECLs have in the focus group discussion? 5. How did your team analyze the data?

Photo voice	1. How did your team develop the research questions and protocol for the photovoice? 2. Who took the photos and wrote the narratives? 3. What roles did your ECLs have in conducting the photovoice? 4. How did your team analyze the data?

Observations/ Mapping	1. How did your team develop the research questions, check list or protocol for the observations/mapping? 2. How did you collect the data? What roles did your ECLs have? 3. How did your team analyze the data?

Top 3-5 Findings Column: List the 3-5 key findings that resulted from data and information gathered and analyzed.

Attachments: List all tables, graphs, maps, survey instruments, matrices and other relevant documents that reflect all research you did, which you will attach to this submission. Label the attachments and put the title of each in this column.

Table 1. Diagnosis Summary Example

Diagnosis Activity	Methods	Top 3–5 Findings	Attachment
Key Informant Interviews	1. The Youth team developed the interview guides through a training with TFP. They brain stormed questions based on their research question and refined them with the support of staff for each informant. At first there were 10 questions, but the team pared it down to 5 so that the informants had more time to express their thoughts, experiences and opinions. 2. After learning more about the issue, the team selected 5 Key informants: Environmental Health, store owners, UCSF researcher, local decision maker, and a community organization leader. We wanted to get a range of perspectives, both potentially opposing and supporting. We recruited them through the support of TFP and other partners. 3. The ECLs paired up to do each of the interviews: one ECL was the interviewer and the other note-taker. We made sure that everyone had a chance to do each role, and that they were able to interview one of the key informants they were most interested in. The PC helped schedule them and was present for all the interviews either on the phone call or in person. Before the interviews, the ECLs practiced interviewing each other with the interview guide. 4. I utilized the 4 workshop series to guide the team on learning about themes and identifying themes per question for the interviews. Workshop 2- fun-analysis was the most fun for our team- we had music and snacks at each question station! Workshop 3 on identifying main themes for each question was helpful in having our ECLs share and present their case about what should be the main themes. After Workshop 4, our team celebrating finishing our theme table by going out for food together!	1. Corner store owners expressed that managing and redeeming coupons and promotional was a taxing process and did not bring about much revenue for the store. 2. Community leaders, especially those that work with youth, were concerned by the targeted advertisement, promotional items, and access to cheap cigarettes in the neighborhood. They supported the idea of regulating advertisement and coupons for tobacco, alcohol and other unhealthy products 3. UCSF researcher that assessed stores in San Francisco found that there were more advertisement and coupons for tobacco products in low-income communities and stores near schools.	Attachment A: Interview Guides Attachment B: Notes Table Attachment C: Summary Theme Table

Table 1. Diagnosis Summary #1

Diagnosis Activity, Primary Research #1:	
Methods	
Top 3–5 Findings	
Attachment #	

Table 1. Diagnosis Summary #2

Diagnosis Activity, Primary Research #2:	
Methods	
Top 3–5 Findings	
Attachment #	

Table 1. Diagnosis Summary #3

Diagnosis Activity, Primary Research #3:	
Methods	
Top 3–5 Findings	
Attachment #	

Table 2. Community Presentation Plan

In Step 3, your team is required to conduct two presentations on your team's findings to inform, educate and engage community members and stakeholders. The presentations include the Community Action Model showcase and a community presentation your team organizes on your own. We encourage your team to presents back to the community that you engaged to gather your primary data from.

Fill out this table to describe your ECL team's plan and progress of organizing your own community presentation, with at least 4–5 sentences for each question. Please also attach your final draft of your CAM Showcase presentation.

How were your ECLs involved in developing your presentation?

What different roles do your ECLs have in organizing, developing materials, and/or presenting the presentation?

Which organizations or community groups will your team reaching out to for your community presentation?

Why did your team choose these groups to present to? Why would these groups care h about the issue?

What is your team's progress in reaching out and finalizing a location, time and date for your presentation?

How will your team engage attendees in responding and providing feedback to your presentation and findings?

Action Ideas & Rationale

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Instructions

During your workshop series your team generated Action Ideas or Policy-System-Environmental Change solutions. Please describe them below, ordered by priority, and answer the following questions regarding rationale as well as identify your primary target/decision-maker**.** CAM Staff Lead will then review and discuss these Action Ideas with you and help your team finalize to one Action Idea. Your team will then use this Action for your Midwest Academy Strategy Chart session and Action Plan.

Please bring this to the CAM Partner Meeting and email it to your CAM Staff Lead.

- **Action Idea:** Please describe the Policy-System-Environmental Change solution to your CAM issue.
- **Achievable:** What support is there for this Action? What do stakeholders think about the feasibility of the Action? What other jurisdictions have also implemented similar actions?
- **Long Term & Sustainable:** What kind of long term impact would there be on health? Would this Action continue to have impact in 5 years? How would the impact be sustained? What agencies and resources would be needed to implement, monitor and evaluate this action?
- **Compels PSE Change:** How will this Action change the physical/ built or social environment to improve health?
- **Primary Target/Decision-Maker**: Who is the primary target/decision-maker for your Action? Why did you choose this decision-maker?

Action Ideas

Please provide at least one Action Idea. Use a minimum of 2 sentences per box. See next page for charts.

Action Ideas	
Achievable	
Long Term & Sustainable	

Compels Policy-System-Environmental Change	
Primary Target/ Decision-maker	

Midwest Academy Strategy Chart*

Please fill this out and submit to your CAM Staff Lead.

Organization: Use minimum of 1 sentence to respond to each question below.
Issue of Concern
Long Term Goal (what you really want, for example affordable, housing for all)
Intermediate Goal (what you are trying to win now, your selected Policy-System-Environmental Change/Action)
Short Term Goal (a step to the intermediate goal, for example, your Demonstration Project)

*https://www.midwestacademy.com

Your Targets Remember: a decision maker is always one specific person — it is never an institution or an elected body.
Primary Decision Maker This person has the power to make a Policy-System-Environment change
Secondary Decision Maker(s) This person has influence over the primary decision maker. What power do you have over the secondary target?

Build Your Base: Use 1–2 sentences to respond to questions below.	
Constituent or Ally Name Name at least 5 and use copies of this form.	
What do they gain by working with you? **How does your action fit into their organizational goals?**	
What risks are they taking?	
What power do they have over the target(s)?	

Identify Your Opponents Use 1–2 sentences to respond to questions below.	
Opponent Name Name at least 2 and use copies of this form.	
What power do they have over the target(s)?	
What tactic or message can you use to neutralize your opponent?	
Which constituents/allies can help you neutralize your opponents?	

Tactics Describe in 1–3 sentences the tactics that your team or your base can use to influence the decision make you have chosen to target. You will describe your tactics in more detail in your Action Plan Tool.

Community Presentations/Meetings & Endorsements:

Media Campaign:

Demonstration Project:

Stakeholder & Decision-Maker Meetings:
Optional Tactic 1:
Optional Tactic 2

Your Team's Assets & Resources

List at least 5. What resources can be leveraged for the success of your team's Action? Resources include skills, knowledge, and experiences of ECLs.

Action Plan & Ideas

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Instructions

Your team's Action Plan consists of the tactics you will be using to build your power to either: (1) build support and confidence of your base and/or (2) directly compel your decision-maker to support and implement your Action/P-S-E idea. These tactics were identified and generated in your team's Midwest Academy Strategy Chart session. Your team is required to complete 4 tactics listed in the table below.

Your Action Plan & Ideas deliverable includes your final Action and PSE Recommendation, At-a-Glance Action Plan Roles & Timeline, and questions to guide your team in developing your initial ideas and plans for implementing your tactics.

- For each tactic, your team should also identify ECL team members who will be involved in implementing the tactic.
- As the Project Coordinator, your main role would be to provide guidance and technical assistance, coordinating and delegation of tactics, monitoring progress on implementation, and meeting deliverable deadlines.
- OPTIONAL OTHER TACTICS. Your team may generate other tactics during your MWASC session that they would like to implement. Please make sure to add to them on page 157 and describe them on page 175.

Action Plan & Ideas	Timeline	Due Date
Our Action	NA	NA
Our Proposed PSE Change	NA	NA
Action Plan-at-a- Glance	NA	NA
Community Meetings & Endorsements Plan *Distribute at least 25 educational packets and gain at least 3 endorsements*	November–May	NA
Educational Packet Plan *Fact sheet, endorsement page, model policy and other information*		December 1
Demonstration Project Ideas *Show feasibility and impact of your Action idea on a small scale*	January–March	Plan: December 15
Stakeholder & Decision–maker Meetings Ideas *Total of 6–8 educational meetings with stakeholders including your primary target/decision–maker*	February–May	Plan: January 31
Media Campaign Ideas *Media campaign including social media and traditional media (1 letter to the Editor to 3 outlets and 1 press event)*	February–May	Plan: February 28
Other Tactic Ideas (OPTIONAL) *Other tactics generated from your MWASC that can build confidence/ support of your base or compel your decision–maker*	your team's decision	

Our Action

Instructions: Please describe your team's final Action idea by answering the following questions. Your responses will help guide your development of your proposed Policy-System-Environmental (PSE) Change language. Answers to each question should be 1–3 sentences.

Remember: Your Action = a Policy, System, or Environmental Change

What is your final Action Idea? Is it a policy change solution, a system change solution or an environmental change solution?
Ex: Our team's final action/PSE change idea is to enact a policy change that would ban the sale of all flavored tobacco products, including menthol products citywide in San Francisco.

What is the overall goal or purpose of the Action in order to improve community health?
Ex: The overall goal of this policy change is to improve community health by preventing access to flavored tobacco products in San Francisco retailers. Because of industry targeting, flavored tobacco use is prevalent among youth and minority groups. By ending the sale of these products, we can protect the health of youth who are highly susceptible to addiction and long term tobacco use and prevent the health inequities that are placed upon communities of color.

Who is the primary target or decision-maker for your Action?
What governing or decision-making body are they a part of?

Ex: The primary decision maker for our Action is Supervisor Malia Cohen. She is a part of the San Francisco Board of Supervisors that oversees decision-making processes in San Francisco.

Who [people] or what [places, agencies, etc.] does this Action apply to?

Ex: This policy change would apply to all retailers in San Francisco that sell flavored tobacco products.

Who will be implementing, monitoring, and evaluating the Action to ensure its effectiveness and impact? (Ex. Department of Public Health, School Board, Building Manager, Director of an organization, etc.)
Ex: The San Francisco Department of Public Health's Environmental Health Branch will be implementing and monitoring this policy change.

How will the Action be implemented? What situations or parameters does the Action change apply to? What are some conditions or exceptions?
Ex: The SFDPH Environmental Health Branch will implement this policy citywide by conducting educational outreach visits to inform retailers for the first six months after the policy is in place. Then, they will be checking the stores to see if they comply with the policy and administering fines if retailers are still selling flavored tobacco products. This policy will apply all stores that sell tobacco in San Francisco. However, we could consider applying the policy to only stores that are close (5 blocks) to schools or youth serving organizations.

What are the consequences, if any, if the Action is violated or not adhered?
Ex: Retailers who do not comply with this policy change will receive a fine of $200 if they do not adhere to the law.

Based on your answers in this section to develop your final proposed PSE Change.

Our Proposed PSE CHANGE

Formerly "Model Policy" deliverable

Instructions: Please fill out the following template based on your team's responses above (1. Your Action & Proposed PSE Change). In total, your proposed PSE Change should be no more than 10 sentences. This was formally known as the "Model Policy" deliverable.

TITLE OF PSE CHANGE: ______________________________

WE, ______________________________ [ORG/TEAM],

ARE COMMITTED TO...

[GOAL/ PURPOSE OF THE PSE CHANGE].

THEREFORE, WE RECOMMEND THAT THE:

____ [GOVERNING/DECISION-MAKING BODY]

ENACT THE FOLLOWING...

[POLICY, SYSTEM OR ENVIRONMENTAL CHANGE]:

____

[POPULATION OR LOCATION THAT THE PSE CHANGE APPLIES TO]

WILL...

[KEY ELEMENTS OF THE PSE CHANGE]

ANY CONDITIONS OR EXCEPTIONS:

WHO WILL MONITOR IMPLEMENTATION OF THE PSE CHANGE & THE CONSEQUENCES, IF ANY, OF VIOLATION:

EXAMPLE #1:

Menthol & Flavored Tobacco City Wide Policy

We, Youth Against Flavors, are committed to protecting the health of communities, particularly for youth and minority groups who disproportionally use flavored and menthol tobacco products due to industry targeting. Therefore, we recommend that the Board of Supervisors of San Francisco enact the following policy change:

San Francisco tobacco retailer or any tobacco retailer agent or employees should not sell or offer for sale, or possess with intent to sell or offer for sale any flavored tobacco products. Tobacco products that would be subject to prohibition on sale would include, but not limited to, flavored cigarettes, including menthol cigarettes, flavored cigars, flavored smokeless tobacco, flavored shisha, and flavored nicotine solutions that are used in electronic cigarettes. Flavored tobacco product is any tobacco product that contains a constituent that imparts characterizing flavor.

The Director of Public Health and/or the Environmental Health Branch should implement the policy and ensure that tobacco retailers are in compliance to the policy. Violation of the policy would be punishable by suspension of the retailer's tobacco permit.

EXAMPLE #2:

Healthy Fresh Choices the Northern District

We, Northern Neighbors for Health, envision everyone in our community eating and living healthy. The Northern District community members drive or commute out of the neighborhood to access healthy foods while choices in our neighborhood are not fresh and expensive. Therefore, we propose that Food Justice Committee in Glenview create the following system change:

Existing funding categorized for food access in Glenview should be utilized to create a distribution and incentive program which will require the Fresh Grocers

Market to stock cornerstores and small markets healthy foods (ex. fruits, vegetables, whole wheat bread, brown rice, milk, water, etc.) at a discounted price. This program should be implemented to supply at least cornerstores/small markets in the districts where more than half of residents travel 20 minutes to buy healthy foods, based on Food Justice Annual Food Access Survey.

The Food Justice Committee will implement this program in partnership with the Small Business Support Services and Department of Health. Food Justice Committee should monitor and evaluate the progress and impact of the program.

CAM Step 4 Action Plan at-a-Glance

Instructions: This At-A-Glance chart provides an overall picture of your CAM Action Plan for you, your team and TFP staff. You can even enlarge and post it for your team to use!

To complete the chart please do the following:

1. Fill in name of ECL members working on the tactic
2. Actual dates your team will be working on the tactic
3. (OPTIONAL): Add any additional tactics, with a short description, team names and timeline in row 6 and 7. We encourage your team's creativity in generating other tactic ideas but given the short time frame we suggest choosing no more than two extra tactics.

Action Plan Tactics

Please fill in the names of the ECL team member who will lead each tactic, and the exact deadline dates. Add additional tactics as needed.

	ECLs Team Lead	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8
Community Meetings & Endorsements									
Educational Packet									
Demonstration Project									
Stakeholder & Decision-maker Meetings									
Media Campaign									

A sample at-a-glance chart follows...

SAMPLE Action Plan Tactics

	ECLs Team Lead	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8
Community Meetings & Endorsements	Derek, Brittany			Start 12/1			End 3/15		
Educational Packet	Kitty, Maryna, Arletha	Start 10/1	Due 11/15						
Demonstration Project	Cheryl, Jessica, Allie	Start plan 10/15		Plan Due 12/15	Start 1/15	End 2/28			
Stakeholder & Decision-maker Meetings	Derek, Brittany		Identify		Plan Due 1/31	Start 2/15		Meet with Target	
Media Campaign	Kitty, Maryna, Jessica			Start 12/17		Plan Due 2/28	LOEs	Press event with Protest/ Rally	
Organize a rally/ protest in front of JUUL labs	Brittany, Derek, Kitty, Maryna						Plan	Protest/ Rally/Press 4/11	

Community Presentations & Endorsements Plan

Objective: To gain 3–5 community organization endorsements in order to build a base of supporters who will support your Action, show up to any planned events/tactics, and spread the word to others.

Instructions: Your team may also gain endorsements from individuals, but this plan focuses on organizational endorsements which requires engaging the executive director or someone in a leadership position at an organization. We encourage you to engage CAM partner organizations for endorsements, but ***they will not be counted towards your community endorsements.***

Your CAM ECL team will be engaging and educating community organizations and stakeholders about your project's issue, key findings and ACTION solution to build your team's base or supporters/backers. To do so, your team will:

1. Create an Educational packet with an Endorsement Form to inform and engage these community organizations, and
2. Engage community organizations to set up meetings or presentations to inform them about your CAM project's Action idea to gain their endorsements.

Tip: the list of allies generated from your Midwest Academy Strategy chart should be used as a starting point to identify community organizations to engage for endorsements.

Community Presentations/Meeting Plan

Please fill out this chart to share about your team's plan related to your Community Presentations & Endorsement. Copy this form to discuss at least six (6) allies generated from your MWASC that your team wants to engage for make an educational presentation and an endorsement.

Organization Name
Ex: ABC Neighborhood Center
Gate Keeper Who in the organization you want to contact for a presentation, meeting and/or endorsement
Ex: Director of Programs, Evelyn Garcia
Strategy How will your team contact the gatekeeper to set up a meeting? When will your team do this? What do you have to offer them for their support?
Ex: We will ask our Executive Director to contact or email and introduce the project and PC during the Thanksgiving holidays. The PC will then follow up to set up a phone call/one-on-one meeting for the ECLs to share more about the project and ask for the endorsement. Our team and organization will also support their upcoming event by providing volunteers. We will emphasize the alignment of goals related to the health and well-being of youth in our community.

PC Role What responsibilities will the PC have in reaching this ally?
Ex: PC will follow up with email or phone call after our ED contacts Evelyn Garcia to set up a time and date.

ECL Role Who on your ECL team is taking the lead on this? What responsibilities does s/he/they have?
Ex: George, Benny & Jessica will take lead on meeting and presenting to ABC Neighborhood Center. They were alumni of the afterschool program and/or their siblings still go there. They will develop talking points for the meeting or phone call. They will be part of the meeting or phone call to present about the project and ask for the endorsement.

CAM Staff Lead Support Do you need support from the Funding Agency's CAM Staff Lead to reach this organization? Yes or No?
Ex: No help is needed at this point.

Educational Packet Development Plan

Objective: To develop an educational packet to share with community organizations, stakeholders and your primary target decision-makers.

Instructions: Your team's educational packet should tell a compelling story about your team's project and proposed Action. Your educational packet will be what the community organizations, stakeholder and decision-maker keep after your meetings, so make sure your packet is compelling, eye-catching, and easy/fast to read.

At minimum, your Educational Packet should include the following:

1. **2-page Fact Sheet**: background on the issue, your team's key findings, your proposed PSE Change, visuals, background on your organization/CAM team, contact information, and website/social media handles.
2. **1- page Endorsement Form:** Brief overview of issue, your Action and/or proposed PSE change, ways community organizations can support your team's Action, contact information of endorser (name, organization, email, phone, address), and official signature of support.

Throughout Step 4 & 5, your team will add to your Educational Packet to include:

1. Letters of Support or Endorsement List
2. 2-page Demonstration Project Report
3. Other supporting materials

Please answer the following questions about the Educational Packet Plan. Please write a minimum 3 sentences per question:

1. What are the key messages and information that will be in the Educational Packet? (Key findings, endorsement form, action/model policy, etc.)
2. What ways could a community organization endorser get involved or support your team's Action?

3. Who on your ECL team will be involved in the development of the Educational Packet? What responsibilities will they have in developing content, design, and etc.?

4. Will you be using your organization's website or social media platforms to share your educational packet and gather endorsements? If so, please describe.

5. Who will you reach out to in order to test the materials on for readability, language, content, and graphic design?

6. How will you share your Educational Packet? To whom will you distribute at least 25 packets (individuals and organizations)?

F. Demonstration Project Ideas

Objective: Demonstrate the feasibility and effectiveness of your Action/Policy-System-Environmental Change solution by implementing the solution on smaller scale for no more than two months.

Instructions: For now, we just want your initial ideas about the Demonstration Project generated from Step 4's Workshop 5. **Please write a minimum of 3 sentences per question.**

1. What are your team's Demonstration Project ideas? (list more than one if you are stuck between choices)

2. How do they meet the 5 main ingredients of a Demonstration Project?

3. What are the desired outcomes or changes or products your team wants to see from the Demonstration Project?

4. OPTIONAL: Please share with us photos from the "Newsworthy" activity in Workshop 5 if you did it with your group.

YOUR FINAL DEMONSTRATION PROJECT PLAN IS DUE ____

Key Stakeholders and Primary Target/Decision-Maker Engagement Idea

Objective: Engage and inform at least 6–8 key stakeholders, including your key decision-maker or primary target identified in the Midwest Academy Strategy Chart session about your CAM issue, and Action to neutralize an opponent and/or gain support.

Instructions: Stakeholders are those who either:

1. Are directly **impacted** by the Policy-System-Environmental Change solution, either positively or negatively (such as residents or retailers);
2. Part of **implementing** the Policy-System-Environment Change solution (such as law makers, or enforcement staff); and/or
3. A Secondary Target, and can **influence** your decision-maker/primary target

Please just list at least 3 stakeholders your team generated from your Midwest Academy Strategy Chart, and provide your team's rationale for choosing these stakeholders to engage based on the definition above in a **minimum of 2 sentences**.

Stakeholder	Rationale for Stakeholder: Are they impacted by the PSE? Responsible for implementing the PSE? Can they influence a decision-maker?
Ex. Malia Cohen, District 10 (Primary Target)	As a district supervisor, Malia Cohen can champion the policy because she represents the district with communities most impacted by tobacco, including Black/African American, youth and APIs. She also has worked on health-related initiatives and voted yes on other tobacco-related policies. Our organization is also located in District 10 and serves young people in the Bayview/Hunters Point. .

Stakeholder	Rationale for Stakeholder: Are they impacted by the PSE? Responsible for implementing the PSE? Can they influence a decision-maker?

Stakeholder	Rationale for Stakeholder: Are they impacted by the PSE? Responsible for implementing the PSE? Can they influence a decision-maker?

Stakeholder	Rationale for Stakeholder: Are they impacted by the PSE? Responsible for implementing the PSE? Can they influence a decision-maker?

FINAL KEY STAKEHOLDER & PRIMARY TARGET/DECISION-MAKER PLAN IS DUE: ___________________________

Media Campaign Ideas

Objective: To educate and mobilize community and stakeholders about your Action through at least one Letter to the Editor to 3 media outlets, a social media campaign, and a press conference.

Your media campaign should include at least one Letter to the Editor, which will be submitted to 3 different media outlets (newspapers, radio stations, etc.), a social media component, and a press conference. We recommend that the press conference/event be either connected to elevating your Demonstration Project (showcasing the project while it is happening or sharing the outcome afterward), or your team's campaign as a whole. The CAM Staff Lead will provide technical assistance and support for your press event.

Instructions: For now, we just want your initial ideas about the media campaign component of your Action Plan. **Please write a minimum of 3 sentences each per question.**

Who does your team want to inform, educate and/or persuade through a media campaign? How will your media campaign build support of your Action or help compel your decision-maker?

What are the key messages you will be sharing through the media campaign? What is the "Call to Action" or what your team wants people to do in response to the campaign
Besides support around a press conference, do you think your team will need any other training or assistance from TFP?

FINAL MEDIA CAMPAIGN PLAN DUE: ____

Other Tactic Ideas (optional)

Instructions: Please describe your other tactic ideas, tactic purpose and your plans for implementation.

1. Please describe the tactic in 2–3 sentences, specifying whether this tactic will build the confidence of your base or directly pressure and compel your decision-maker.
Ex: Organize a rally/protest in front of JUUL Labs in San Francisco and get local students and parents involved to take more preventative measures to stop selling their products to underage youth. This tactic would build the power of our base, allowing like-minded supporters to gather and demand a change occur.
2. When will this tactic happen? How will it be part of the escalating and building upon previous tactics?

3. What kind of technical assistance and support do you need to complete this tactic?

ECL Training Plan

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Submit this to your CAM Staff Lead by end of day (5PM). If you have any questions prior to the deadline, please feel free to call or email. We are more than happy to support you in completing this deliverable.

Instructions:

Skill and leadership development for Emerging Community Leaders is one of the most important goals of the Community Action Model. As the Project Coordinator for your CAM project, your role is to facilitate and support your ECLs in learning new skills and providing opportunities for them to take the lead in decision-making and implementing your project's activities. Creating a training and workshop plan is crucial to ensuring that your ECLs will grow, learn and apply their new skills, as well as help you to complete each deliverable of the CAM. This ECL Training Plan will act as guide for you to develop and schedule your workshops for your CAM team.

During the second half of Step 4, your team's workshops may look less like trainings but time for your team to work on your Action campaign, conducting meetings with stakeholders or activities related to your campaign tactics. We recognize that you may not know exactly what your team will be doing each week, but please try to predict what your team may be working on. For each week, fill out the training topic, date, time and learning objectives of each training.

Training Topic:

- Plug in the required trainings in the menu of training, including CAM Staff-led training
- Use the menu of recommended trainings and CAM Step 4–5 General Timeline
- You do not need to schedule a formal training presentation EVERY week- you may need time to do the work of CAM such as scheduling meetings, finalizing educational packet, implementing your Demonstration Project, meeting with stakeholders, etc.
- Don't forget to add other trainings that support ECL's leadership devel- opment and growth not directly related to CAM project and deliverables, such as organization-specific trainings, other social justice issues, college applications, resume writing, team building, and outings, etc.
- Include holidays when your ECL team may not meet

Time:

- You are required to meet weekly for at least 1.5 hours with your ECL team

Learning Objectives:

- Include 1–2 learning objectives per training
- Learning objectives state the skill or knowledge you want your ECL teams to come away with at the end of the training
- Examples:
    - Define and differentiate Policy-System-Environmental Change, Action and Tactics
    - Create a social-media plan for media campaign
    - Discuss and develop Demonstration Project ideas

Trainings for CAM ECLs — Example

TFP Required Training Topics	Trainer	Timing
Describe CAM Project issue	Project Coordinator/Past ECLs	July–August
Overview of CAM Step 4–5	Project Coordinator	July–August
Define PSE, Action and Demonstration Project Series	Project Coordinator	August–September
ECL PSE/Social Justice Retreat	Tobacco-Free Project	September/October
Utilize Midwest Academy Strategy Chart to develop your CAM Action Plan	Project Coordinators	October
Develop CAM Action Plan	Project Coordinator	September–October
Compose a Model Policy for your Action	Project Coordinator	September–October
Develop effective Educational Packets	Project Coordinator	October–November
Gain endorsements from stakeholders/allies	Project Coordinator	October–November
Create, plan and evaluate Demonstration Project	Project Coordinator	November–December
Create decision-maker engagement plan	Project Coordinator	December–January
Develop Media Literacy and creating a Media Strategy	Project Coordinator	January–February
Practice effective meetings with decision-makers	Project Coordinator	February–March
ECL Celebration	Tobacco-Free Project	May

Trainings for CAM ECLs

TFP Required Training Topics	Trainer	Timing
Describe CAM Project issue	Project Coordinator/Past ECLs	
Overview of CAM Step 4 & 5	Project Coordinator	
Define PSE, Action and Demonstration Project Series	Project Coordinator	
ECL PSE/Social Justice Retreat	Tobacco-Free Project	
Utilize Midwest Academy Strategy Chart to develop your CAM Action Plan	Project Coordinators	
Develop CAM Action Plan	Project Coordinator	
Compose a Model Policy for your Action	Project Coordinator	
Develop effective Educational Packets	Project Coordinator	
Gain endorsements from stakeholders/allies	Project Coordinator	
Create, plan and evaluate Demonstration Project	Project Coordinator	
Create decision-maker engagement plan	Project Coordinator	
Develop Media Literacy and creating a Media Strategy	Project Coordinator	
Practice effective meetings with decision-makers	Project Coordinator	
ECL Celebration	Tobacco-Free Project	

Step 4: Select and Implement Action Plan

Week of	Date	Time	Training Topic & Learning Objectives

Step 5: Mid-Year Progress Interview

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Purpose

The purpose of the Step 4 check-in is to gather additional qualitative data about the CAM program's impact on the development of the PC and ECL teams. Below is a Key Informant Interview (KII) tool utilized by the San Francisco Tobacco-Free Project conducted by an Evaluator staff not typically engaged in CAM work. The Evaluator conducted phone interviews and compiled key themes into a report for CAM Staff Lead.

Introduction Script

Your team has made it to the halfway point of Year 2 of the CAM! Over the last six months, you have recruited and trained your team on core aspects of Step 4, Select Action and Implement. You and your team has learned a lot about your CAM issue, identifying a Policy-System-Environmental Change, building power and developing a successful campaign. In the second half of this year, you and your ECL team will be implementing your Action Campaign tactics.

In this mid-year progress report, we want to take time for you to reflect and share about the progress you and your ECL team has made so far in Step 4. There are 11 questions total and should take about an hour. CAM is all about developing and training leaders, so in particular, we are interested in hearing abut your ECL team's growth together as a team and individually.

Please be honest about your feedback as it will be used to improve the CAM project overall and for future CAM projects.

Topic Areas for Questions

- Progress for Step 4, Successes & Challenges
- Story re: ECL leadership
- Growth as a Project Coordinator
- Feedback re: Workshop Series
- Feedback re: TFP support & TA & monthly meetings

Interview Questions

1. Tell me about your organization's CAM project and its progress so far in Step 4. What is your team's selected Action? Action campaign tactics? What change does your team hope to achieve at the end of this project?
2. What has been some success and challenges for your CAM ECL team in selecting and developing your Action so far in relation to your ECL team and completing the deliverables for Step 4.
   - **Probes Related ECLs**: ECL recruitment, onboarding new ECLs, ECL team building and team dynamics, lead ECLs, trainings and workshops.
   - **Probes Related to Step 4 process:** generating the Action idea, using the Mid-West Academy Strategy Chart, and developing campaign tactics
3. Describe how you have seen your ECLs grow in leadership and skills over the last six months or even the year and half through the involvement in CAM? Share a story about one of your ECL's growth.
4. Tell us about your lead ECL. What is their role on your team? What have been some successes and challenges with working with your Lead ECL? How have you seen your Lead ECL step up and grow in the last few months?

5. How have you grown as a Project Coordinator and adult ally through-
out the CAM project? How can the Funding Agency's Team better support your growth and leadership?

For question 6 & 7, we want to hear about how the TFP workshop series went for your CAM team. The TFP team provided 7 workshops for you to tailor and use with your CAM team to identify your Action idea and Identify and plan for your Demonstration Project.

- Workshop 1: 5 Whys
- Workshop 2: Identifying Action and Tactic
- Workshop 3: Disrupt the chain- Choose 2–3 Action Ideas
- Workshop 4: What is a Demonstration Project
- Workshop 5: Generate Demonstration Project Ideas
- Workshop 6: Demonstration Project Planning Part 1 (CAM projects may not have gotten here yet)
- Workshop 7: Demonstration Project Planning Part 2 (CAM projects may not have gotten here yet)

6. Tell us about a **CAM workshop**—one provided by the Funding Agency's Team—that was a success. What aspects made it successful and/or what did you do to tailor it to make it successful?
   - **Probes:** Length of workshop, workshop activities, examples, jargon/language used, etc.

7. Tell us about a **CAM workshop** — one developed by the TFP team — that was a total miss or did not work with your ECLs. What could have been changed to improve it?
   - **Probes:** Length of workshop, workshop activities, examples, jargon/language used, etc.
8. Tell us about one of **your workshops** — not provided by the CAM Staff Lead and the Funding Agency — that was successful. What made it successful in training and supporting the leadership of your youth?
9. The CAM Staff Lead and Team always wants to get your honest feedback so that they can better support you and improve the CAM program. Can you share with us both positive and constructive feedback on how the CAM Staff Lead provides technical assistance, training and support to CAM?
   - **Probes:** One-on-one meetings, CAM Partner Meetings, Orientation trainings, etc.
   - **Probes:** Project expectations, deliverables and timelines
10. What are some main areas of technical assistance and support you think you will need for the upcoming year?
11. Any other comments or questions you have for the Funding Agency/ CAM Staff Lead.

Demonstration Project Plan

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Instructions

Your team's Demonstration Project is a small-scale, short-term intervention that shows the effectiveness and viability of your team's ACTION, or Policy-System-Environmental Change. It's a tactic that can build confidence of your base but also give direct pressure to your Decision-Maker by showing them that your Action idea is viable and effective. Demonstration Projects will require engaging and coordinating with partners, implementing the intervention and documenting the results. At the end of the Demonstration Project, your team will develop a 1–2 page report to be included in your educational packet and to share with key stake-holders and your target Decision-Maker as your deliverable.

Please fill out all three sections as part of your Demonstration Project Plan:

1. Demonstration Project Overview
2. Demonstration Project Team Members & Their Roles
3. Demonstration Project Plan Timeline

Please email this to your CAM Staff Lead by 5pm end of day.

Key Ingredients of a CAM Demonstration Project

"Trial vesrion" of your PSE change	< 2 months but more than a few hours	Achievable: It CAN be done!
Change can be captured through photos or storytelling	Unique & Disruptive	

DEMONSTRATION PROJECT OVERVIEW

Please provide your responses to the following questions to give us an overall sense of your Demonstration Project**. Use a minimum of 3 sentences. Question 1 only requires one sentence.**

1. What is the objective of your team's Demonstration Project? Please use SMART objective format: Specific, Measurable, Attainable, Relevant and Time-based.

2. Whom will you engage to implement the plan? How will they be involved? (store owners, school staff, and etc.?)

3. Where will the Demonstration Project be implemented?

4. What outcome does your team envision through the Demonstration Project? Whose health or wellness will benefit from it? Or, whose lives will be changed?

5. How will your team assess whether your outcome was achieved?

6. What challenges or barriers does your team anticipate?
   How will you address those challenges?

7. What ways can the CAM Staff Lead team provide support?

Demonstration Project Team Members and Their Roles

How are your ECLs taking a leadership role or supporting the project?

Please describe each team member's role in the Demonstration Project.

CAM Team	Name	Role
Project Coordinator		
Lead ECL		
ECL		
ECL		
ECL		
ECL		
ECL		
ECL		
ECL		

Demonstration Project Plan & Timeline

Your Demonstration Project should have three phases:

1. **Planning and coordinating (about 1–1.5 months):** You may need to engage and coordinate partners, develop and purchase materials, take “before photos,” and coordinate other logistics and plans. The planning and coordinating phase can take up to 1–2 months.
2. **“Doing” or Implementation (up to 2 months):** Your small-scale, short-term Policy-System-Environmental Change goes live! What will actually happen during the Demonstration Project and for how long? Don’t forget to capture your project through photos and videos. The implementation phase can take up to 1–2 months.
3. **“Checking” or Evaluation and reporting (1–2 weeks):** Your team should capture the results of the Demonstration Project through photos, storytelling, and other means of data collection. Your team will also develop a 1–2 page report on the Demonstration Project. The key findings from this report and a way to access the full document should be included in your Educational Packet.

Please fill out the following chart by listing out your team’s activities to complete all three phases of the Demonstration Project, the timeline of the activity, and the CAM team members involved. Please add more rows as needed.

Dates	Step	ECL Team members
Planning and Coordinating		
Implementation aka “Doing”		
Evaluation and Reporting aka “Checking”		

Key Stakeholders and Primary Target/ Decision-Maker Engagement Plan

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Objective: Engage and inform at least 6–8 key stakeholders, including your key decision-maker or primary target about your CAM issue, and Action to neutralize an opponent and/or gain support.

Very Important People (VIP) Stakeholders & What to Do

VIP Stakeholders are elected or appointed officials, such as Commissioners, Board of Supervisors and Board of Education members, and their staff as well as heads of city agencies and their departments. If your team will be meeting with any VIP stakeholders, please inform your CAM Staff Lead at least two weeks prior to the scheduled date.

Stakeholders are those who either:

1. Are directly **impacted** by the Policy-System-Environmental Change solution, either positively or negatively;
2. Will be a part of **implementing** the Policy-System-Environment Change solution or Demonstration Project; and/or
3. A Secondary Target, and can **influence** your decision-maker/primary target

Key Tips For Planning Meetings with Stakeholders & Decision-Makers:

1. **When should we be meeting with our Stakeholders?**
    - If the stakeholder has a crucial role in your Demonstration Project, then we suggest that you begin to engage them early on. For example, if your stakeholders are principals at schools you want to implement your Demonstration Project then meeting early is key. If your

stakeholder is the manager at a housing agency you wish to go smoke-free (but you don't have strong contacts there), meeting early is key.

- If the stakeholder is impacted by the PSE solution positively, such as residents who would have access to healthier foods, gaining their support can help build power before meetings with a secondary or primary decision-maker.
- If the stakeholder is impacted by the PSE solution negatively, such as a retailer who will no longer be able to sell flavored tobacco, we suggest waiting until your team has gained enough support from community organizations and other stakeholders to meet with them.
- Meetings with primary decision-makers/targets can happen multiple times throughout your campaign. For example, you could have an initial meeting to invite the decision-maker to an event connected to your Demonstration Project in their district and then follow up with another meeting to inform them more about the results of your Demonstration Project, support letters, and the proposed PSE. Or, your team can wait until later in Step 4 and have one meeting to inform the decision-maker about your project's issue, recommended PSE, letters of support, and Demonstration Project.

2. **How should we reach stakeholders & decision-makers?**
   - We recommend that Project Coordinators guide and support ECLs in drafting emails, making phone calls, etc. to reach the stakeholder and decision-makers. One best practice is to have ECLs develop the emails, but use a central email either the Project Coordinators or a group email account to send out the emails so that Project Coordinators can track and, if needed, quickly respond to replies.
   - Send an email or phone calls that provides a brief introduction to your organization and project with a request for a meeting.

- Elected officials may have staff that help schedule and organize meetings. Your team may also meet with elected officials' staff member rather than the elected themselves, as they will also have key insight into the priorities and agenda of the elected official.

3. **How should we plan for a meeting?**
    - Once a meeting is secured, develop and practice the agenda with your team. Identify the "Ask" for your meeting, by thinking about what your team aims to gain from the meeting with the stakeholder. How can the result of the meeting continue to build power or put pressure on your primary decision-maker to move your Action forward?
    - Guide your team in developing an agenda that includes introductions, a brief overview of your issue, presentation of some key facts, and your proposed action. Your ECL lead or ECLs can also take ownership of specific meetings and lead the development of the agenda.
    - ECLs who will be at the meeting should have different roles including speaking, note taking, time keeping, and sending out follow up emails.

4. **What should our meeting with our stakeholder look like?**
    - Your meeting should be short 30–45 minutes, and potentially shorter if your meeting is with an elected official. ECLs and Project Coordinators should attend with ECLs being the lead presenters.
    - Bring your educational packet, letters of support, Demonstration Project report, visuals, and other items that can help share the importance of your team's issue and proposed Action.
    - Follow your agenda, exchange contact information, and ask who else your team should talk to.
    - Find out when and how to follow up with any agreements and actions from the meeting

Stakeholder Engagement Plan

Discuss at least 6 stakeholder/decision-makers generated from your MWASC that your team wants to engage and inform around your Action idea. Use one copy of this chart for each.

Decision-Maker or Stakeholder Name	VIP
Ex: Department of Public Health's Director of Office on Policy & Planning	*Yes or No?*

Purpose of Meeting What will you be informing the stakeholder/ decision-maker? What is the "Ask" of the stakeholder/ decision-maker? Or what does your team hope to gain from the meeting?
Ex: We will be informing them about our issue, using our educational packet, and asking for their expert insight and opinions about our Action idea, other community and stakeholders to approach. The ask is information about the how to get on the agenda of the Health Commission.

Strategy to Reach them: How will your team contact decision-maker or stakeholder? Are there other people or gatekeepers that you need to connect with to reach this stakeholder/ decision-maker?
Ex: ECL Tim will reach out through email, including a follow up phone call and email within a few days.

PC Role What responsibilities will the PC have in reaching, setting up, and preparing for the meeting with this stakeholder/ decision-maker?
Ex: Support team by reviewing draft email to be sent, guiding team in developing an agenda and key roles for the meeting

ECL Role Who on your ECL team is taking the lead on this meeting? What responsibilities does s/he/they have?
Ex: ECL Jenna and Tim will develop the draft of the email, draft agenda and roles for the team, and help facilitate a planning meeting with the rest of the team 1 week before the meeting date.

Staff Support Do you need support from TFP to reach this organization?	**Date/week for the meeting(s)**
Ex: CAM Staff Lead can help ECL team with an introduction. TFP team will need to notify Leadership of this VIP meeting.	*Ex: Week of September 8*

Media Campaign Plan

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Instructions

Objective: To educate and mobilize community and stakeholders about your Action and Demonstration Project through a **social media campaign** and **one additional media activity**.

1) Social Media Campaign

The social media campaign should use one or more social media channels to inform and engage community members, community organizations and/or decision-makers about your issue, your Action, and Demonstration Project. Social media campaigns should also include a call to action, or ways that others can get involved or support your campaign. For your campaign choose one or two audiences — be specific and be strategic on which social media channel to use. Your plan will include:

- Objective
- Message & Channel Worksheet, Audience 1
- Message & Channel Worksheet, Audience 2 (Optional)
- Team Roles & Responsibilities
- List of Organizations, Stakeholders & Decision-Maker Social Media Handles
- Editorial Calendar

2) Media Activity for Demonstration Project

One of the criteria of your Demonstration Project is "newsworthy." We recommend that the additional media activity elevate your Demonstration Project, by showcasing the project while it is happening or sharing the outcome afterwards. Be creative about this additional media activity but also be strategic based on your target audience. We also encourage you to amplify this media activity using your social media campaign as well.

Examples of additional media activities include:

- Traditional Press (newspaper, TV, radio) through a press event, media alert, etc.
- Local organization or school newsletters, magazines, etc.
- Opinion (Letter to the Editor and Op-Ed)
- Other digital platforms: blogs, podcasts, vlogs, etc.

Your Additional Media Activity Plan Includes:

- Objective
- Message & Channel Worksheet, Audience 1
- Message & Channel Worksheet, Audience 2 (Optional)
- Media Activiy Steps & Roles

Please turn in this Media Campaign Plan to your CAM Staff Lead.

1) Social Media Campaign

Social Media Campaign Objective (Specific, Measurable Attainable, Realistic, Time-bound):

Message & Channel Worksheet

Use one worksheet per audience.

Audience Who are you trying to reach with your campaign? Why is this audience important in building power and movement for your Action? Use 2–3 Sentences:

Audience Values: What does your audience care about in relation to your issue? Use 2–3 Sentences.

Key Finding: What key findings or information do you want your audience to know? Use data and research from Step 2&3.

The Ask: What do you want your Audience to do? Identify 2–3 Asks for your audience to support your tactics and help build power. (Endorsements, show up to a presentation, talk to a decision-maker, etc.)

Key Messages: Put the values, findings and ask together to create 2–3 different key messages that can be used to as a basis of your social media posts.		
Key Message 1	Key Message 2	Key Message 3

Authentic Story
What is a real life story that can engage your audience's emotion and communicates one of your key messages? Use a min. of 3 sentences.

Social Media Platforms & Account Name
Which social media platforms will you be using to reach this audience? Check which ones apply to the audience. Please add your account name.

Facebook Handle	
Twitter Handle	
Instagram Handle	
TikTok Handle	

Social Media Campaign Roles & Responsibilities

We encourage you to ask ECLs to take on specific tasks for the social media campaign. Example of tasks can be to (1) Create content for posts (2) Review and edit posts to ensure key message and asks are aligned with campaign objective (3) Post and respond to posts on team's account and (4) Track followers, responses, likes, etc. We recommend that PCs review all posts and responses to posts before ECLs post on social media.

Team Member Name	Responsibility
ECL:	
ECL:	
PC:	

Social Media Handles of Endorsement Organizations & Stakeholder/Decision-Makers

Do some research on the social media accounts of community organizations, stakeholders & decision-makers that you are trying to reach with your message for the platforms you will use for your social media campaign. Make sure that your team is following those accounts so that your message can reach them.

For example, if you will be using Facebook and Instagram find and follow the accounts for organizations you want to reach for only those platforms. If you are using more than two social media platforms, just add another column. You may also find that not all organizations have social media accounts for all types of platforms.

Names of Organizations & Stakeholders	Social Media Handle/ Platform #1	Social Media Handle/Platform #2

Social Media Campaign Editorial Calendar

An editorial calendar helps your team get organized and plan for posts throughout the campaign. We suggest that your team chooses one or two days a week to post on a regular basis.

Please give us an example of your social media campaign by providing 4 scheduled posts.

WE WILL BE POSTING ON THE FOLLOWING DAYS EACH WEEK:

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

Date	Social Media Channel	ECL/PC Responsible

Message	Graphic/Photo Idea

Date	Social Media Channel	ECL/PC Responsible

Message	Graphic/Photo Idea

Date	Social Media Channel	ECL/PC Responsible

Message	Graphic/Photo Idea

Date	Social Media Channel	ECL/PC Responsible

Message	Graphic/Photo Idea

Additional Media Activity

For Demonstration Project

Media Activity Objective (Specific, Measurable Attainable, Realistic, Time-bound):
Audience Use one worksheet per audience:
Who are you trying to reach with your campaign? Why is this audience important in building power and movement for your Action? Use 2–3 Sentences:

Audience Values: What does your audience care about in relation to your issue? Use 2–3 Sentences.

Demonstration Project: What do you want your audience to know, specifically around your Demonstration Project? Use 1–2 sentences

The Ask: What do you want your Audience to do? Identify 2–3 Asks for your audience to support your tactics and help build power. (Endorsements, show up to a presentation, talk to a decision-maker, etc.)

Key Messages: Put the values, findings & ask together to create 2–3 different key messages that can be used to as a basis of your social media posts.		
Key Message 1	Key Message 2	Key Message 3

Authentic Story
What is a real life story that can engage your audience's emotion and communicates one of you key messages? Use a min. of 3 sentences.

Media Activity & Channel
What media activity will you be using? .

Name of Channel	Why did you choose this channel? How is it most effective in reaching your audience?
Letter to Editor	
Press Event:	

Newspaper:	
Blog:	
Vlog	
Radio:	

Podcast:	

Additional Media Activity Plan

Please write out the steps your team will take to complete media activity and who is responsible.

Examples of steps, which are not specific to one type of media activity, include:

- Drafting and developing the content for the media activity
- Pitching the story to news outlets, newsletters, radios, magazines, online blogs, etc.
- Creating images, graphic designs, photos, videos etc. for the content
- Review, refining and editing the content
- Being a spokesperson for press or other media outlets
- Posting the media activity
- Tracking responses to the media activity
- Other activities

Step	When	ECL or PC responsible

EXAMPLE: Social Media Campaign

Message & Channel Worksheet, Audience #1

Social Media Campaign Objective (Specific, Measurable Attainable, Realistic, Time-bound):

To inform parents and parent organizations in the Green Valley Unified School District about the need and importance for more physical activity opportunities, and mobilize at least 20 parent/parent organizations to sign a petition for the Board of Education to include a classroom physical activity break policy in Middle Schools through a 6 week Facebook social media campaign between February 1 and March 15, 2019.

Audience Who are you trying to reach with your campaign? Why is this audience important in building power and movement for your Action? Use 2–3 Sentences:

We are trying to reach parents and parent organizations like parenting support groups and PTAs in Green Valley. They care about their children's health and well-being as well as have power to influence school decision-makers. Parents are the ones who can vote for Green Valley School Board Members, and so their voices and opinions matter.

Audience Values: What does your audience care about in relation to your issue? Use 2–3 Sentences.

Parents and parent organizations care about their children and the quality of their school's education and activities. They want their children to do well in school, be healthy and achieve in life. Therefore, they would be concerned that schools are not providing enough physical activity opportunities and the harm it does to their kid's health and ability to learn.

Key Findings: What key findings or information you want your audience to know? Use data and research from Step 2&3.

- *School age youth need to participate in 60 minutes or more of daily vigorous physical activity. Green Valley Middle School students only have 30–45 minutes of physical activity per day through physical education classes.*
- *Physical activity prevents obesity and diabetes, reduces stress and anxiety, and supports learning and improves standardized test results.*
- *20% more white middle school students participate in organized physical activity (ex. soccer, gymnastics etc.) outside of school than students of color. Students of color have higher obesity rates than their white student counterparts.*

The Ask: What do you want your Audience to do? Identify 2-3 Asks for your audience to support your tactics and help build power. (Endorsements, show up to a presentation, talk to a decision-maker, etc.)

We want parents and parent organizations to sign a petition to have a classroom physical activity policy that requires teachers to integrate a 5-minute physical activity into their class periods and curriculum at least two times a week. We also want parents to join our Five Minute Fitness Action Network newsletter so that they can be informed about ways that they can take action and support our campaign.

Key Messages: Put the values, findings & ask together to create 2–3 different key messages that can be used to as a basis of your social media posts.		
Did you know that Green Valley Middle School students are getting half of the required amount of physical activity as they need to be healthy and do well in school? Adding 5 minutes of physical activity in every class is an investment towards all of Green Valley's children's future health and education. Sign our petition to get this Five Minute Fitness policy in our schools.	*60 minutes of physical activity each day is what your kids need to be happy, healthy and successful. But kids are only getting half that amount through their PE classes and not all families can afford after school sports programs. Adding just five minutes of physical activity in every class will strengthen their minds and bodies. Join our Five Minute Fitness Action Network to make sure your kids get what they need.*	*More than ever before, children are obese or over-weight, leading them to future health problems like diabetes and heart disease. Schools are not doing their part in providing the physical activity they need to protect their health. An extra five minutes per class can go a long way in preventing future medical conditions and costs. Join our Five Minute Fitness Action Network to make sure our Board of Education knows that children's health matters.*

Authentic Story

What is a real life story that can engage your audience's emotion and communicates one of you key messages? Use a minimum of 3 sentences.

My little brother Jimmy is having a hard time concentrating and doing well in 7th grade. He says, "I'm always stuck in my desks in class, especially math, and it is hard to pay attention. My legs just want to get going, and I got in trouble for kicking them under my chair. Why can't we have recess like in elementary school?" Green Valley Middle school students are stuck in their seats from 7AM until 3PM- 8 hours of sitting with only a lunch break and 30 minutes of physical activity during PE. They are still kids who need to play, be active and have fun. And they aren't hitting their needed 60 minutes of physical activity a day to be healthy and do well in school. Teachers can easily add 5 minutes of physical activity into their classroom time and make it relevant and fun to their learning. Let our School Board know that the Five Minute Fitness Policy can help students like Jimmy succeed by signing our petition.

Social Media Platforms & Account Name

Which social media platforms will you be using to reach this audience? Check which ones apply to the audience. Please add your account name.

Facebook Handle	*FiveMinFitnessGV*

Message & Channel Worksheet, Audience #2

Audience Who are you trying to reach with your campaign? Why is this audience important in building power and movement for your Action? Use 2–3 Sentences:

We are trying to reach Green Valley teachers and teacher unions and organizations with our campaign. We want more teachers to become allies of our campaign and support our policy. Teachers would be implementing the FiveMinute Fitness policy and in order for the policy to be successful they have to support it.

Audience Values: What does your audience care about in relation to your issue? Use 2–3 Sentences.

Teachers value student's health and education as well as managing a positive learning environment. They want their students to pay attention, do well on standardized tests and earn good grades. They may be concerned about the extra work that is needed to add physical activity into their classrooms, especially for topics like math or English that do not seem related to physical activity.

Key Findings: What key findings or information you want your audience to know? Use data and research from Step 2&3.

- *School age youth need to participate in 60 minutes or more of daily vigorous physical activity. Green Valley Middle School students only have 30–45 minutes of physical activity per day through physical education classes.*
- *Physical activity helps improve tests scores and promotes learning in students*
- *Adding 5 minutes of fun physical activity into your classroom can be easy. Students getting up out of their seats to stretch, moving around to act out a part of a book, or a short dance party break can all help add up to the 60 minutes they need each day*

The Ask: What do you want your Audience to do? Identify 2–3 Asks for your audience to support your tactics and help build power. (Endorsements, show up to a presentation, talk to a decision-maker, etc.)

- *We want teachers to sign a petition to have a physical activity policy that requires them to integrate a 5-minute physical activity into their class periods and curriculum at least two times a week.*
- *We also want them to join our Five Minute Fitness Action Network newsletter so that they can be informed about ways that they can take action and support our campaign.*
- *We want teachers to volunteer to add 5 minutes of physical activity into their classrooms, by using our FiveMinute Fitness Toolkit, and telling us about how it went by taking our survey.*

Key Messages: Put the values, findings & ask together to create 2–3 different key messages that can be used to as a basis of your social media posts.		
Did you know that Green Valley Middle School students are getting half of the required amount of physical activity as they need to be healthy and do well in school? Just adding 5 minutes of physical activity in your class is an investment towards all of Green Valley's children's future health and education. Check out our 5 minute Fitness Toolkit for easy ways to get your students moving.	*Some students just can't keep still or are always acting up in class, and it's because they aren't getting enough physical activity. Our Green Valley Students are only getting half of what they need each day! Adding physical activity breaks into classroom can help improve classroom behavior and standardized testing results.* *Join our Five Minute Fitness Action Network to make sure that all students are on their way to success.*	*Not all families can afford after school sports programs to keep their kids healthy and successful in schools. Teachers can help play a part in protecting our Green Valley students' health by just adding 5 minutes of physical activity break into their classrooms. It's not just a benefit to your students' health but to your classroom success! Sign our petition to make sure all students and classrooms get the physical activity they need!*

Authentic Story

What is a real life story that can engage your audience's emotion and communicates one of you key messages? Use a minimum of 3 sentences.

Physical activity breaks is all you need in improving your classroom behavior and outcomes. Mrs. Malone teaches 7th grade English at South Green Valley Middle School. She noticed that her 7th grade boys often act up and having a hard time concentrating in class, especially right before lunchtime. There was a lot of kicking of desks, shaking of knees and stomping in her class that distracted other students from learning. She thought that perhaps they just needed to release some energy! Mrs. Malone's classrooms now have a 5 minute fitness time at the middle of the hour. Each student draws a physical activity card and gets to lead the whole classroom in stretc.hing, dancing, jumping and more. Her students pay more attention to the lesson and are doing better on tests! Check out more ways you can add 5 minutes of fitness into your class room by checking out our Toolkit.

Social Media Platforms & Account Name Which social media platforms will you be using to reach this audience? Check which ones apply to the audience. Please add your account name.	
Facebook Handle	*FiveMinFitnessGV*
Twitter Handle	*FiveMinFitnessGV*

Social Media Campaign Roles & Responsibilities

Team Member Name	Responsibility
ECL: *Stella*	*Develops content for posts with Ron*
ECL: *Ron*	*Develops contents for posts with Stella*
PC: *Frances*	*Reviews and approves posts and responds to posts.*

Social Media Handles of Endorsement Organizations & Stakeholder/Decision-Makers

Names of Organizations & Stakeholders	Social Media Handle/ Platform #1	Social Media Handle/Platform #2
Green Valley PTA	*GreenValley PTA, Facebook*	*N/A*
South Green Valley Middle School PTA	*SouthGVMS_PTA, Facebook*	*N/A*
Green Valley Teachers Union	*GVTeachers, Facebook*	*GVTeachers, Instagram*
Parents Upholding Green Valley Students	*UpholdingGVStudents, Facebook*	*N/A*
Teachers for a Better Green Valley	*Teachers4BetterGV, Facebook*	*Teachers4BetterGV, Instagram*

Social Media Campaign Editorial Calendar

WE WILL BE POSTING ON THE FOLLOWING DAYS EACH WEEK:

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

Date	Social Media Channel	ECL/PC Responsible
	Facebook & Instagram	*Stella & Francis*
Message		**Graphic/Photo Idea**
Our Green Valley Students are only getting half of what they need each day! Check out what Mrs. Malone did to add physical activity breaks into her classroom to help improve classroom behavior and standardized testing results. *Find out more ways to do so by joining our Five Minute Fitness Action Network and downloading the Fit Classroom Toolkit.*		*Video of Mrs. Malone's physical activity break during class*

Date	Social Media Channel	ECL/PC Responsible
	Facebook	*Ron & Francis*
Message		**Graphic/Photo Idea**
Green Valley Middle School students are getting half of the required amount of physical activity as they need to be healthy and do well in school? Adding 5 minutes of physical activity in every class is an investment towards all of Green Valley's children's future health and education. Tell the Board of Education that we need Five Minute Fitness policy in our schools by signing our petition.		*Picture of bored kid at desk dreaming of jumping rope.*

Date	Social Media Channel	ECL/PC Responsible
	Facebook & Instagram	*Stella & Francis*
Message		**Graphic/Photo Idea**
Not all families can afford after school sports programs to keep their kids healthy and successful in schools. Teachers can help play a part in protecting our Green Valley students' health by just adding 5 minutes of physical activity break into their classrooms. Sign our petition to make sure all students and classrooms get the physical activity they need!		*Picture of students doing yoga in classroom.*

Date	Social Media Channel	ECL/PC Responsible
	Facebook	*Ron & Francis*

Message	Graphic/Photo Idea
1 in 4 Green Valley Middle School students are obese or overweight. Diabetes and heart disease is in their future. Schools are not doing their part in providing the physical activity our students need to protect their health. Join our Five Minute Fitness Action Network to make sure our Board of Education knows that our children's health matters.	*Picture of obese or overweight students. Or infographic of 1 in 4 over-weight students.*

Additional Media Activity

For Demonstration Project

Media Activity Objective (Specific, Measurable Attainable, Realistic, Time-bound):

To inform the great public and pressure the head of the Board of Education to adopt the Five Minute Fitness policy by having at least one published Letter to the Editor that highlights our Demonstration Project "Five Minute Fitness February" at South Green Valley Middle School in the local news printed or online by March 15, 2019.

Audience Who are you trying to reach with your campaign? Why is this audience important in building power and movement for your Action? Use 2-3 Sentences.:

We are trying to reach Green Valley parents, teacher and most importantly the Board of Education. The Board of Education would be the decision-making body that can adopt our Five Minute Fitness policy in all Middle Schools.

Audience Values: What does your audience care about in relation to your issue? Use 2–3 Sentences.

The Board of Education cares about the well-being of students, but physically but especially academically. If the Middle schools do not perform well on State standardized testing then our schools will not receive as much funding allocation for the next year. Last year, only 3 out of the 5 Middle Schools met the standardized test minimum. 1 out of 4 students are also overweight or obese based on last year's school health survey. Five Minute Fitness policy would require teachers to integrate at least two 5-minute fitness breaks each week which would increase health and improve educational outcomes.

Demonstration Project: What do you want your audience to know, specifically around your Demonstration Project? Use 1–2 sentences

Five Minute Fitness policy would require teachers to integrate at least two 5 minute fitness breaks each week which would increase health and improve educational outcomes. One of the middle schools, South Green Valley Middle School has adopted this 5 minute Fitness policy in the school for the month of February, or Five Minute Fitness February. Each teacher has utilized our toolkit of physical activity ideas and reported on the ease and effectiveness of this policy in their classrooms. Two-thirds of the teachers even found students who had a hard time concentrating in class doing better on their homework and quizzes.

The Ask: What do you want your Audience to do? Identify 2-3 Asks for your audience to support your tactics and help build power.
(Endorsements, show up to a presentation, talk to a decision-maker, etc.)

- *Green Valley Board of Education should adopt this Five Minute Fitness policy at all Middle Schools to improve the health and learning of our middle school students.*
- *Parents and teachers should join our Five Minute Fitness Action Network to get involved in making sure this policy is passed.*

Key Messages: Put the values, findings & ask together to create 2–3 different key messages that can be used to as a basis of your social media posts.

Key Message 1	Key Message 2	Key Message 3
Our middle school students are getting only half of the daily physical activity that they need at school. The lack of physical activity impacts their health and test scores. The Board of Education should adopt the Five Minute Fitness Policy to take care of our students' bodies and minds.	*South Green Valley Middle School launched Five Minute Fitness February and got all their students moving during class. Students danced in English, stretched in Math, and hula hooped in Science to learn about physics! Teachers found that their students were more engaged and did better on homework and quizzes. Let's make Five Minute Fitness all year long by telling the Board of Education to adopt our policy district–wide.*	*Our schools and students are in danger. 3 out of the 5 Green Valley Middle Schools met the standardized test minimum last year while 1 out of 4 students are also overweight or obese. Five Minutes of Fitness in classrooms will save our schools!*

Authentic Story

What is a real life story that can engage your audience's emotion and communicates one of you key messages? Use a minimum of 3 sentences.

Mrs Malone teaches 7th grade English at South Green Valley Middle School. She noticed that her 7th grade boys often act up and having a hard time concentrating in class, especially right before lunchtime. There was a lot of kicking of desks, shaking of knees and stomping in her class that distracted other students from learning. She thought that perhaps they just needed to release some energy! Mrs. Malone's classrooms now have a 5 minute fitness time at the middle of the hour. Each student draws a physical activity card and gets to lead the whole classroom in stretc.hing, dancing, jumping and more. Her students pay more attention to the lesson and are doing better on tests!

Media Activity & Channel

What media activity will you be using? .

Name of Channel	Why did you choose this channel? How is it most effective in reaching your audience?
Letter to Editor	*Everyone reads Green Valley Times especially elected officials. The Board of Education will feel more pressured to adopt this policy if they read this LOE.*

Additional Media Activity Plan

Step	When	ECL or PC responsible
Research and find the template for the Letter to Editor for the Green Valley Times, GV Post, and Valley-ish (online news).	*Mid February*	*Susana*
Draft the 3 LOE based on the templates and our main messages.	*March 10th*	*Susana, Leo & Ted*
Review and edit the 3 LOEs	*March 20th*	*Francis*
Send out each LOE and respond to editor responses	*March 25th*	*Francis*
Monitor to see if there are any comments or activity based on the LOE on the online news sites.	*March 25-April 15*	*Francis*
Post the LOE snippet on our Facebook and Instagram and RT each the Board of Education if it gets published	*March–April*	*Stella & Ron*

Action Plan Progress Report

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Submit this to your CAM Staff Lead by end of day (5PM). If you have any questions prior to the deadline, please feel free to call or email. We are more than happy to support you in completing this deliverable.

Instructions:

Please fill out the following table that describes your success, challenges, steps to overcome and TA needs for tactics in your Action Plan.

- Share ECL team and Lead ECL accomplishments and challenges.
- Please share progress on your required Campaign Tactics.
- If your team identified additional, optional tactics, please include those at the bottom of the chart.

Please read the instructions below for specific details on how to complete each column.

Successes: Please describe in 5–8 sentences your ECL team's progress on this tactic in your Action Plan, highlighting key successes (ECL involvement/participation, accomplishments, etc.) and learnings you are having as a Project Coordinator. Please be specific in what your team has accomplished thus far, include number of meetings and with whom, number of packets distributed, and etc. Additionally, please describe your successes in recruitment, training and leadership development of your ECLs and Lead ECL.

Challenges: Please describe in 5–8 sentences any challenges or barriers your ECL team is having or had in completing this tactic. Please highlight any challenges with trainings, ECLs engagement and participation in the activity, and/or barriers completing the tactic. Additionally, please describe your challenges in your development of your ECLs and Lead ECL.

Steps to Overcome & TA Needs: Please also describe how you are working towards overcoming these challenges, and any technical assistance and support you may need.

Action Plan Progress Report

ECL Training & Development

Recruit, train and maintain 6–8 ECLs and 1 Lead ECL to implement Step 4 & 5 of the CAM	
Progress (5–8 sentences)	

Challenges (5–8 sentences)	

Steps to Overcome & TA Needs	

Community Meetings & Endorsements

Gain 3–5 community organization endorsements in order to build a base of supporters who will support your Action, show up to any planned events/tactics, and spread the word to others.	
Progress (5–8 sentences)	

Challenges (5–8 sentences)	

Steps to Overcome & TA Needs	

Demonstration Project

Demonstrate the feasibility and effectiveness of your Action/Policy-System-Environmental Change solution by implementing the solution on smaller scale for no more than two months.	
Progress (5–8 sentences)	

Challenges (5–8 sentences)	

Steps to Overcome & TA Needs	

Key Stakeholder & Primary/ Target Decision-Maker Engagement

Engage and inform at least 6–8 key stakeholders, including your key decision-maker or primary target about your CAM issue, ACTION/PSE Change solution to neutralize an opponent and/or gain support	
Progress (5–8 sentences)	

Challenges (5–8 sentences)	

Steps to Overcome & TA Needs	

Media Campaign

Educate and mobilize community and stakeholders about your Action through at least one letter to the Editor to 3 media outlets, a social media campaign, and a press conference.	
Progress (5–8 sentences)	

Challenges (5–8 sentences)	

Steps to Overcome & TA Needs	

Any Other Tactic:	
Progress (5–8 sentences)	

Challenges (5–8 sentences)	

Steps to Overcome & TA Needs	

Demonstration Project Report Instructions

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Submit a Final Draft of your Demonstration Project Report to your CAM Staff Lead. If you have any questions prior to the deadline, please feel free to call or email. We are more than happy to support you in completing this deliverable.

Purpose of the Demonstration Project Report:

A 1–2 page report that tells the story of your team' Demonstration Project and highlights the impact that it made in addressing the issue your team is addressing. This 1–2 page report should be included in your Educational Packet and shared with your primary and secondary decision-makers.

Guidelines for the Demonstration Project Report:

- 1–2 pages
- Photos, graphics, and visuals
- Addresses the following:
    - **Why?** What was the purpose or goal of the Demonstration Project? What issue was your team trying to address with the Demonstration Project? What need and solution was your team trying to demonstrate?
    - **When? How? Who?** What happened during the Demonstration Project? Who was involved?
    - **What?** What was the results of the Demonstration Project? What was the impact?

- **Now what?** Now that your Demonstration Project is complete, what does your team want to see happen on a larger scale? What are you asking the decision-maker or stakeholder to do?

Year 2: Final Report Outline

Community Action Model Projects

ORGANIZATION: ____

PROJECT: ____

DUE DATE: ____

Instructions

The CAM model has two intertwined yet distinct goals: (1) to create social change at the Policy-System-Environmental level and (2) to build community capacity of Emerging Community Leaders. The Final Report is where you get to describe and share about how your organization's CAM project accomplished those goals. Please sit down initially to write some notes, then return and commit a good block of time to pull together substantial answers. This Final Report helps to support investment in the CAM project. Your insights are essential to continuing our improvement of the process as well as continued investment in the community through CAM. The report focuses mainly on Step 1: Train participants and Step 4–5: Select and Implement Action to maintain and Enforce Action.

- Section 1: ECL Capacity Building and Training
- Section 2: Action Plan Report Back
- Section 3: Maintenance and Enforcement
- Section 4: Close Out Questions

Please also include the following with your Final Report

- ☐ Deliverables & Materials from tactics listed
- ☐ ECL Training & Tracking Sheet
- ☐ Make sure all ECLs have completed the ECL exit survey

Section 1. Emerging Community Leader Capacity Building & Training

STEP 1: ECL CAPACITY BUILDING.

We want to know more about the ways your ELCs have grown through participating in the CAM project.

Tell us 2 stories that show how your ECLs have grown in their skills and knowledge as community leaders throughout the CAM project.

What are some key skills and knowledge your ECLs gained that will be useful beyond the CAM project? (Surveying, public speaking, etc.). How did they gain these skills in their participation in the CAM?

What are some soft skills or leadership skills/attributes your ECLs gained that will be useful beyond the CAM project? (team work, planning projects, confidence, etc.) How did they gain these skills in their participation in CAM?

ORGANIZATION'S ROLE IN CAPACITY BUILDING.

We want to know more about how your organization engaged and trained your ECLs, specifically tailoring and developing trainings to meet the culture and language of their community. Culture includes age group, racial ethnic background, immigration status, sexual identity, sexual orientation, etc.

Describe your agency's strategies to engage and retain your team of ECLs. What were some of the most effective strategies for your ECL population? What challenges did you encounter in engaging and retaining your team of ECLs?

Which trainings or workshops did you or your organization provide that was the most impactful and useful in building your team's skills to complete the activities in Step 4? How did you know that these trainings were most effective?

How did you tailor, translate and/or conduct trainings to ensure that it was culturally and linguistically appropriate for your Emerging Community Leaders?

Section 2. STEP 4: ACTION PLAN, REPORT BACK

ACTION (PSE Change) What was your CAM team's "Action"?
Rationales for Action How did it meet the 3 criteria? Please use 3–5 sentences to describe your team's rationale.
A) Achievable:

Rationales for Action How did it meet the 3 criteria? Please use 3–5 sentences to describe your team's rationale.

B) Long Term & Sustainable:

Rationales for Action How did it meet the 3 criteria? Please use 3–5 sentences to describe your team's rationale.
C) Compels Environmental Change:

Action Plan Strategy & Policy-System Environmental Change Result
A) Please summarize your team's strategy in compelling a decision-maker to adopt and champion your Policy-System-Environmental Change. (5–7 Sentences)

Action Plan Strategy & Policy-System Environmental Change Result

B) What was the MAJOR challenge your team faced in trying to achieve your PSE change? What steps did your team take to try to overcome this challenge? (5-7 sentence)

Action Plan Strategy & Policy-System Environmental Change Result
C) What was the result of your efforts? Did a decision-maker pass a policy, system or environmental change? If so, please attach copy or documentation of the PSE change.

Action Plan Implementation Tactics

Attachments: Please attach any materials and deliverables with the report submission for each required tact

A) Community Organizations Endorsements (3–5):

- **Outcomes:** Describe in 5–7 sentences the outcomes both qualitatively and quantitatively (if applicable). How was your tactic successful?
- **Challenges**: Describe in 5–7 sentences what challenges, if any, did you encounter in completing this tactic.

Attachments:	Endorsement List

Action Plan Implementation Tactics

Attachments: Please attach any materials and deliverables with the report submission for each required tact

B) Educational Packet

- **Outcomes:** Describe in 5–7 sentences the outcomes both qualitatively and quantitatively (if applicable). How was your tactic successful?
- **Challenges**: Describe in 5–7 sentences what challenges, if any, did you encounter in completing this tactic.

Attachments:	Final Education Packet

Action Plan Implementation Tactics

Attachments: Please attach any materials and deliverables with the report submission for each required tact

C) Key stakeholders and Decision-Makers (6–8)

- **Outcomes:** Describe in 5–7 sentences the outcomes both qualitatively and quantitatively (if applicable). How was your tactic successful?
- **Challenges**: Describe in 5–7 sentences what challenges, if any, did you encounter in completing this tactic.

Attachments:	List of Meetings & Dates. Any Notes or minutes from Meetings

Action Plan Implementation Tactics

Attachments: Please attach any materials and deliverables with the report submission for each required tact

D) Social Media Campaign

- **Outcomes:** Describe in 5–7 sentences the outcomes both qualitatively and quantitatively (if applicable). How was your tactic successful?
- **Challenges**: Describe in 5–7 sentences what challenges, if any, did you encounter in completing this tactic.

Attachments:	Screenshots of social media posts

Section 3. STEP 5: ENFORCE & MAINTAIN THE ACTION

1. Describe any steps your ECLs have taken (or plan to take) to ensure that the PSE change your team proposed is enforced OR sustained beyond the CAM project. If no steps have been taken, describe how will your team or your organization can ensure that your CAM Team's efforts in this project is sustained?

2. Whose job it is to enforce the change or policy that was part of your action? How will they enforce the change or policy? Please attach documentation (steps to enforce, guidelines, definitions, etc.)

Section 4. CLOSE OUT QUESTIONS

1. What skills and experiences did you, as a Project Coordinator, gain through participating in this CAM project?

2. How has participating in the CAM project impacted your organization's desire and capacity to engage in community led policy change efforts?

3. Provide at least ONE (1) recommendation to help improve CAM projects in the future below:

Monitoring & Evaluation

Community Action Model (CAM) Goal:
To train and build capacity of Emerging Community Leaders to change Policies-Systems-Environments (PSE) to improve health.

SFDPH 2 Year CAM Cycle Objectives:

1. To build core knowledge and skills of a cohort of 30-50 Emerging Community Leaders (ECLs) from communities most impacted by health inequities in the areas of public health, community-led research, and community organizing by providing at least 6 trainings directly to ECLs over two years.
2. To build capacity of 4–6 CAM Project Coordinators (Community-Based Organization staff) in developing, training and coordinating Emerging Community Leaders to complete the five steps of the CAM by providing at least monthly trainings (or at least 24 trainings) over two years.

CAM Programs should set up systems and tools to monitor and evaluate each 2-year cycle of CAM as well as the overall program to capture short-term outcomes and long-term impacts. Predominantly process evaluation is utilized to analyze the Funding Agency and the Project Coordinator's capacity building efforts and the implementation of the 5 steps of CAM. Qualitative and quantitative data captured should be used by the Funding Agency in a timely manner for quality improvement efforts to meet the needs of the CAM Project Coordinators and ECLs. Outcome measures for each CAM cycle are the knowledge and skills change of Emerging Community Leaders and whether their team achieved the proposed Policy-System-Environmental Change. However, it is important to note that the latter outcome is often influenced by factors outside of the Funding Agency and CAM team's control, such as political will and timing. Therefore, the building of community leaders, CBO Project Coordinators and Emerging Community Leaders, is ultimately the most important goal to achieve and measure.

SFDPH Tools to Monitor & Evaluate CAM's Two Goals:

Capacity Building

Process Evaluation
- ECL Training & Tracking Sheet
- Training Evaluations
- Funding Agency TA Logs
- Report Qs re: TA/ Training Provision

Outcome Evaluation
- Pre & Post ECL Surveys
- Pre & Post PC Key Information Interviews
- Qualitative Questions on Final Reports re: ECL and PC Capacity Building

PSE Change

Process Evaluation
- CAM Step Deliverable Tracking Sheet
- Report Qs re: successes & challenges on progress

Outcome Evaluation
- Overall Tracking of CAM Projects & Outcomes
- CAM FInal Report

Example: TFP's Key Monitoring & Evaluation Tools	
2-year CAM Cycle	• Pre & Post ECL Surveys • Pre & Post Project Coordinator Key Informant Interviews • ECL Training & Tracking Sheet • CAM Funded Agency's Training and TA Log • Evaluation Tools for Trainings (Surveys, Plus/Deltas, Bulls Eyes) • CAM Step Deliverables & Reports • CAM Step Deliverable Tracking Sheet
Long-Term	• Overall CAM Program Tracking Sheet

In addition, capturing long term outcomes can demonstrate the impact that CAM has on public health policy, systems and environments and ultimately the health of communities. For Funding Agencies that want to utilize the CAM approach long-term, we recommend capturing and monitoring metrics, such as number of funded Community-Based Organizations (CBOs) or Policy-System-Environmental changes achieved over time.

On page 273, the **Community Action Model Theory of Change** depicts how the CAM program leads to building the capacity of community leaders and improving health outcomes for communities most impacted by health inequities. What's difficult to capture in a static flow chart is that CAM is cyclical and compounding in nature: Project Coordinators and Emerging Community Leaders gain and build upon their knowledge and skills as they implement the 5 CAM steps. The more time that the Project Coordinators and the Emerging Community Leaders are engaged in the program, the more they develop as leaders.

The following pages outline and summarize the various evaluation components and metrics we utilize based on the Theory of Change for the San Francisco Tobacco-Free Project's program evaluation and monitoring of our CAM program. We encourage others to modify and develop their own Theory of Change and metrics, utilizing ours as a starting point.

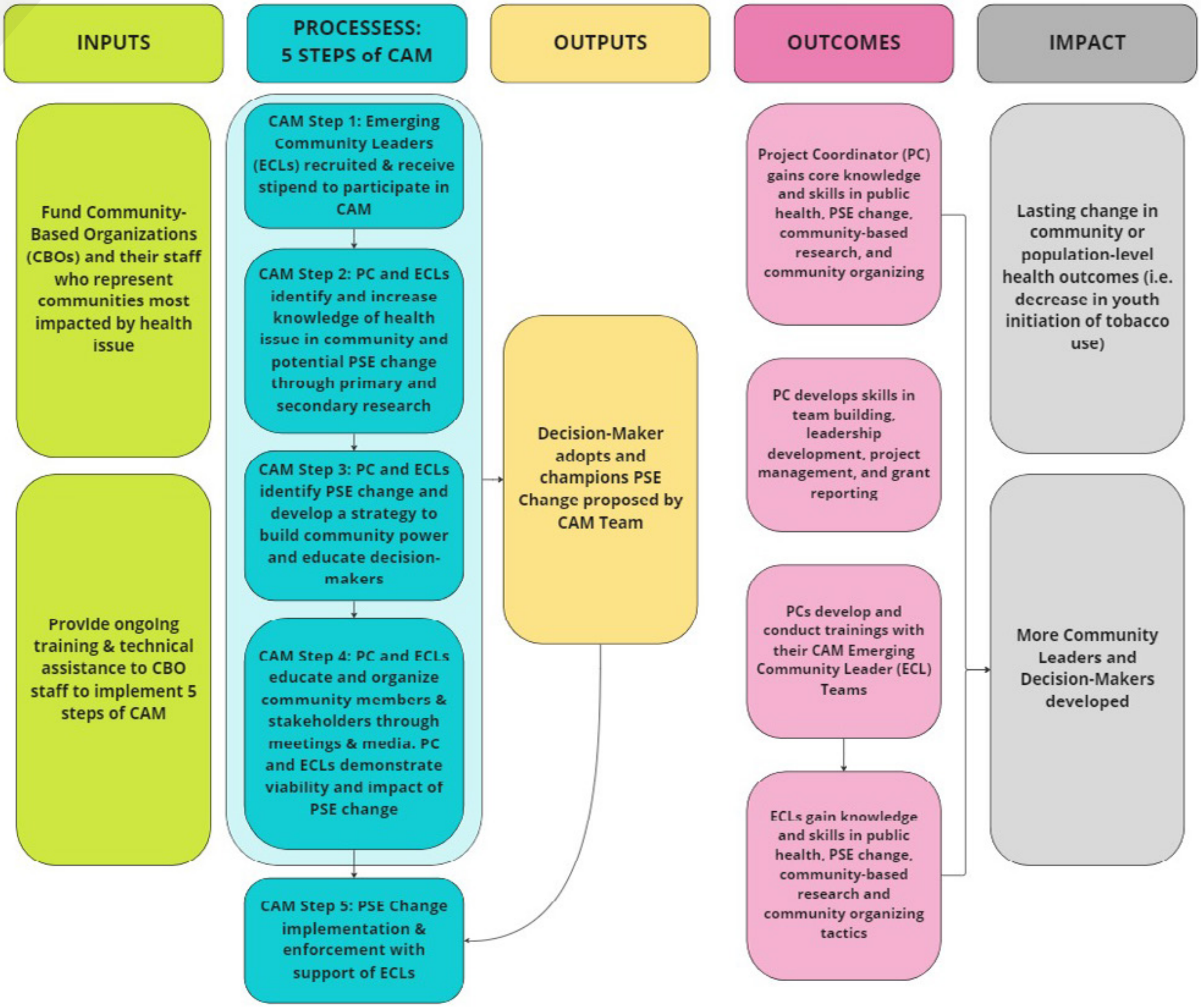
Lastly, we provided the objective, workplan and evaluation activities that we outlined in our California Tobacco Control Plan workplan for the benefit of other Local Lead Agencies to demonstrate how we connect our evaluation efforts into our state workplan.

10 Best Practices for Program Evaluation & Monitoring for the Community Action Model

1. To capture other process and impact evaluation metrics, the program evaluation and monitoring of the Community Action Model program should go beyond evaluation activities outlined by workplan from California Tobacco Control Program or other grant funding;
2. Integrate monitoring and evaluation metrics and tools into funded CBO deliverables, such as tracking trainings and demographics of Emerging Community Leader teams;

3. Designate one internal team meeting per CAM Step (or quarterly) to review and reflect on trainings, PC and ECL feedback, and other data gathered, and document any action steps and changes;
4. Identify one staff person to gather, input and analyze program monitoring and evaluation data;
5. Share back to CBO staff any salient summative findings from data gathered, such as key informant interviews, workshop evaluations, etc., as well as identify together any next steps for improvement during All CAM PC Meetings;
6. Administer different types of training evaluations, such as plus/deltas and bulls-eyes, and not just Likert scale surveys. That way the participants do not feel over surveyed but still capture information needed for quality improvement. Incentivizing and giving time for participants to finish evaluations at the end of trainings is key!
7. In addition to participant surveys after trainings for Emerging Community Leaders, dedicate time in All CAM PC meetings for the Project Coordinators to provide feedback and reflections on trainings provided by Funding Agency & outside trainers;
8. Use an outside evaluator or a staff unrelated to the program to conduct key-informant interviews with Project Coordinators, which helps ensure that they feel safe enough to share honest feedback;
9. When speaking with outside trainers, make sure to bring up the importance of using a training evaluation tool; and
10. Conducting site visits during CAM Partner workshops and meetings can also support monitoring of CAM partner trainings as well as identifying areas for improvement.

Community Action Model Theory of Change



San Francisco Tobacco-Free Project's CAM Monitoring and Evaluation Components

San Francisco TFP evaluation of CAM is robust, as our project intends to both improve the process while conducting it and disseminate the CAM to other health departments and projects. Below are three major categories of evaluation: 1. TFP capacity building of CBOs and Project Coordinators; 2. TFP and CBO capacity building of Emerging Community Leaders; and 3. Implementation of the CAM steps.

TFP's Capacity Building of Community-Based Organizations and Project Coordinators				
Components	**Question**	**Tools**	**Metrics**	**Responsible**
CAM Funded Community-Based Organizations	How many CBOs have been funded to implement CAM through TFP?	Overall CAM Tracking RFPs	• # of CBOs participating in CAM • Neighborhoods • General demographics served	TFP CAM Team
CAM Partner Project Coordinators	How many Project Coordinators are trained through the CAM? Who and what communities do they represent?	CAM PC Orientation Surveys Overall CAM Tracking	• # of CAM Partners Project Coordinators • General Demographics	TFP CAM Team
Tobacco-Free Project TA and Training Provision	How satisfied are Project Coordinators by TFP's training and TA provision overall? How can TFP's trainings and TA support be more effective?	Pre & Post Key Informant Interviews (State Plan: 3-E-2)	• Qualitative data on overall satisfaction of training/TA and areas for improvement	Outside Evaluator
Tobacco-Free Project TA and Training Provision	How many hours and instances of trainings and TA does TFP provide to CAM partners over the 2-year cycle? Per organization?	TA & Training Log (State Plan)	• # and hours of training • Total # and hours of TA • # and hours of TA per organization	TFP CAM Team
Project Coordinator Participation	How many trainings do Project Coordinators receive? What is the average participation rate?	Sign In Sheets	• # participants at monthly Partner Meetings & trainings	TFP CAM Team
Project Coordinator Training Satisfaction	How satisfied are Project Coordinators by TFP's trainings per CAM Step? What additional areas of support do they need to complete each step?	Training Surveys for Orientation & Step trainings for PCs (State Plan: 3-E-3)	• Qualitative data on overall satisfaction of training/TA and areas of improvement • Identify areas of additional TA/ support	TFP CAM Team
Project Coordinator's Knowledge, Skills & Other Leadership Development	What skills and knowledge have Project Coordinators gained through the CAM program in areas of public health, community leadership development, and professional growth?	Pre & Post Key Informant Interviews (State Plan: 3-E-2)	• Qualitative data on overall knowledge, skills and professional development	Outside Evaluator

TFP's and CAM CBO Capacity Building and Training of Emerging Community Leaders				
Evaluation Components	**Question**	**Tools**	**Metrics**	**Responsible**
TFP Emerging Community Leaders Trainings	How satisfied are ECLs by TFP's trainings provided at each step and the orientation? How can the trainings improve/be more effective?	Training Surveys for Orientation & Step trainings for ECLs	• Qualitative data on overall satisfaction of training/TA and areas of improvement • Identify areas of additional TA/support	TFP CAM Team
CAM Partner ECL Trainings	How many trainings does the CAM Partner provide to ECLs? What is the participation rate? What proportion of trainings are ECLs playing a leadership role in?	ECL Training & Tracking Sheet	• # of trainings • # of ECLs at trainings • # of trainings with ECL involvement in training (facilitation, agenda planning, note taking)	CAM Partners Deliverables
CAM Partner ECL Trainings	How satisfied are ECLs in their CBOs trainings? What ways can the trainings be improved?	Post Workshop Surveys, 3 per quarter	• Qualitative Data on overall satisfaction of training and areas of improvement	CAM Partners Deliverable
ECL Participation & Demographics	How many ECLs does the CAM train every cycle? What are their demographics? Are we reaching people whose community is most impacted by tobacco & targeted by the industry?	ECL Training & Tracking Sheets	• Start & End Date • Names • Age • Demographics	CAM Partners Deliverables
ECL Skills & Knowledge & Other Leadership Development	What proportion of ECLs increase their knowledge of CAM core areas? What proportion of ECLs are more confident in practicing CAM core skills? How has participation in the CAM impacted their education and career goals?	Pre & Post Surveys (State Plan: 3–E-1)	• Change in knowledge of CAM Core Areas • Change in confidence in CAM Core Skills • Qualitative data on reasons for Joining • Goals for participation • Future Aspirations	Outside Evaluator

Implementation of the CAM Steps				
Evaluation Components	**Question**	**Tools**	**Metrics**	**Responsible**
PC & ECL implementation of 5 steps of the CAM	What progress, success and challenges does the CAM teams have in implementing the 5 steps of the CAM?	• Progress Reports & ECL Developed Plans for Step 2 & 4 • Deliverable Tracking sheet	• Qualitative data on progress and challenges • # Deliverables completed on time	CAM Partners
TFP Program Implementation	What are successful and effective ways that TFP has implemented the CAM program at each step? (ex. timelines, deliverables, TA/support, structure, tools) What are ways to improve quality of program implementation?	• TFP CAM Team meetings +/Deltas	• Internal qualitative data on areas success and improvement per Step	TFP CAM Team
Educate & Present to Stakeholders/ Decision-makers **QI Measure*	How many presentations are made by CAM partners and their ECLs to stakeholders & decision-makers during Step 4 on their proposed Policy-System-Environmental change?	• Step 4 Progress & Final Reports • Internal tracking sheet	• # of presentations to Decision-makers/stakeholders • Result of meetings	CAM Partners/ TFP CAM Team
Policy -System-Environmental Change Achieved	How many Policy-System-Environmental changes were adopted through CAM work by decision-makers to improve health?	• Step 4 Reports • Overall CAM Tracking	• # of Policy-System-Environmental change adopted by decision-makers	CAM partners

California Tobacco Control Plan (CTCP) and Community Action Model Evaluation Activities

Examples of SF Tobacco-Free Project's CTCP Objectives used for the CAM program:

- By June 30, 2021, City and County of San Francisco will annually engage in participatory collaborative partnership with at least 4 youth serving organizations with a total of 15–25 youth (14–20 years old), that represent communities of color, utilizing the Community Action Model (CAM) to train and mobilize their involvement in at least 3 tobacco-related activities per year such as community assessments; engagement and education of stakeholders, development of tobacco-control related policy, environmental and system change; and other activities that address tobacco-related determinants of health. Each CAM Cycle extends two years; therefore resulting in a total of 8 youth serving organizations and 30–50 youth total over the four years. (Youth Engagement)
- By June 30, 2017, At least 2 culturally and ethnically diverse organizations funded through both Prop 99 and Master Settlement Agreement funds will implement the Community Action Model, a five- step process that focuses on community norm, tobacco policy level change at the community level will develop a Scope of Work, that meets cultural competency standards that address organizational values, participatory planning, provision of capacity building, translation policies, and staff diversity. (Equity in Funding)

Examples of SF Tobacco-Free Project's CTCP Workplan Evaluation Activities used for the CAM program:

- Develop and conduct pre-and-post survey of 40–60 youth ECLs to assess skills and capacity built through their participation in the series of CAM trainings, in areas such as community assessment, message development, presentations, tobacco, social determinants of health, and public health. The survey sample will be a full census of all participating ECLs. Descriptive analysis comparing pre-and-post outcomes for each area will be conducted and summarized in a summary report. Findings will be shared with the youth serving agencies to identify areas where youth trainings need to be strengthened.

- Develop a KII instrument and conduct at least 8–10 KIIs with staff from youth serving agencies to gather insight on how youth agencies integrated youth development and engagement in their CAM work; a self-assessment of their strengths and additional areas of support needed; organizational capacity built through participation in the CAM; and any areas of improvement for the Tobacco-Free Project's (TFP) provision of technical assistance and training. Evaluator will conduct content analysis to generate key themes, quotes, and recommendations from youth serving agencies to improve the CAM model. Findings will be summarized in a short report. The report will be shared internally with the TFP team and with the youth serving agencies for overall program improvement.
- A survey will be developed and implemented to evaluate trainings provided to the youth- serving agencies' Project Coordinators. The instrument will measure all participants' (approx. 8–10) satisfaction with the full-day training, knowledge of the CAM, tobacco as a social justice issue, and the extent to which they feel prepared to implement the CAM to tobacco control issues. Quantitative analysis will be conducted on surveys. Summary statistics and key themes will be summarized and shared with staff, generating recommendations to improve training for future CAM youth-serving agencies.

15 Lessons Learned from Trial & Innovation in Implementing the Community Action Model

The implementation of the Community Action Model (CAM) program has evolved considerably since its inception in the late 1990s. Rooted in Paulo Freire's popular education principles and the promotora model, the CAM was designed to build community capacity to address health disparities. This is done with a focus on changing Policies-Systems-Environments, rather than individual behavior change. Though the values and 5-steps of the CAM remain the same, the implementation of the CAM has adapted, innovated and, in turn, is continuously improving to better build capacity of Community-Based Organizations, their staff and Emerging Community Leaders (ECLs).

We want to share our reflections and lessons learned through experimenting and tinkering with the Community Action Model over the last 20 years with other CAM practitioners. We encourage anyone implementing CAM to consider trying your own small or large changes to improve the model. Especially important are those changes recommended by your funded CAM partners to improve the quality of capacity building for the participants who in turn activate better Policy-System-Environmental change outcomes.

Funding and Partnering with Community-Based Organizations

1. **Choosing the "right" Community-Based Organization for CAM is about their potential and relationship with the community.** For the CAM, agencies that are dedicated to serving and reaching communities most impacted by health disparities as well as willingness to shift their practices towards creating Policy-System-Environmental (PSE) change are the "right" agencies. These partner agencies, their Project Coordinators and Emerging Community Leaders do not need to be policy or research experts. Those skills are taught through the CAM process. Instead, what is needed is the commitment to learning, openness to developing

critical consciousness, and in turn taking action to create change. To value this, we recommend setting your Request for Proposal evaluation rubric to give weight to these assets rather than solely applicant experience in public health programs, PSE change, and/or research.

2. **Be explicit to CAM partner agencies that CAM isn't about providing individual-level services or individual level behavior change.** Service-type community agencies are plentiful and can be great CAM partners! That said, it's important to have a discussion with these agencies to explain that CAM is not "business as usual". These groups must be willing to move toward PSE change and community engagement, which can be somewhat outside their usual scope if they run after-school programs, deliver counseling services, or provide another type of direct service. It's crucial to remind each agency that at minimum 4 full days (0.8 FTE) of the Project Coordinator's time are required in order to effectively complete CAM deliverables - it's not possible to divert them to other projects, and succeed with the goals for both.
3. **When communicating to community organizations the funding opportunity for the CAM, break down CAM into digestible pieces and explain it in multiple ways to help them identify alignment to their organization's mission.** CAM can get too technical with jargon and steps and sometimes it can be difficult to make clear connections between the CAM process and the community benefit and impact. Organizations that are interested in applying to the funds may not realize that this is a capacity building grant with some training and support provided, or that their organization will need to develop workshops and trainings for their Community Leaders themselves rather than using a curriculum. While other community health focused organizations may have difficulty shifting their frame of individual-level public health interventions towards Policy-System-Environmental level change. On the other hand, organizations focused on advocacy or campaign work may not be able

to make the connection that their work can be translated to public health. Sharing how CAM creates change through stories, case studies, webinars, and other real-life examples can bring the model to life for potential partner agencies who are interested in the funding, allowing them to make connections to their current work or organizational mission. It is not necessary for organizations to memorize the steps and details of the model; the crucial details will be absorbed through the process. What's important is alignment with, or even openness towards the overall mission of building community leaders and creating Policy-System-Environmental level change solution to improve health.

4. **At least a 0.8 FTE Project Coordinator is the sweet spot**. In a prior round, the SF TFP attempted at "CAM Planning Grants", or mini CAMs, each with a half-time (0.5 FTE) staffer and learned what our predecessors had already known — CAM takes people power. Project Coordinators need dedicated time to develop curricula, train ECLs, and complete deliverables and activities essential to the CAM process. For this reason, we really insist that at least an 80% staffer be assigned as Project Coordinator -- better yet, a full-time person. We found that our CAM Planning Grants were generally not successful as staff time dedicated to the project was absorbed by other agency needs. Similarly, having two part-time Project Coordinators from the same agency "sharing the role" was not successful. In various cases, the Co-Coordinators faced difficulty in differentiating their roles in the project or were pulled into other responsibilities, thus diluting the staff effort committed to CAM work.
5. **Remaining funds from CAM projects at the end of a two-year cycle can be offered as no-cost extensions**. Sometimes CAM does not work to the scheduled plan. In many cases, staff turnover, ECL absences or other budget underspending occur by the end of the second year. Historically, the opportunity to continue spending any the remaining funds into a final third year has been offered to projects. If the Funding Agency

allows such no-cost extensions, it is a great opportunity to continue the momentum of the work and utilize any unspent funds from the partnering agency contract.

6. **Set guidelines or minimums for compensation for Emerging Community Leaders & meeting times in the Request for Proposal.** Partner agencies may have varying cultures around setting staff salaries and incentivizing ECL participation. Through years of funding, we have learned that it is important to set guidelines as guard rails to ensure that somewhat comparable funding is given to Project Coordinators and ECLs regardless of the partner agency they are affiliated with. This may mean advocating for a salary increase for Project Coordinators to bring their salary more in line with the pay that other agencies are paying. Project Coordinators conduct the same work regardless of their agency, so this is an opportunity for Funding Agencies to practice PSE skills by ensuring a better and more just wage. Similarly, ECL minimum compensation guidelines should be set. Some agencies may perceive ECL participation as simply giving a gift card or providing food and snacks. In fact, ECLs are at the core of the model, and their participation must be honored and compensated. By providing them with a substantial incentive for participation, we can prepare these future leaders for entry into the workforce or supplement their existing pay given they are taking on additional responsibility.

Supporting the Project Coordinator

7. **Understand and delineate the delicate balance between the roles of a Project Coordinator and Emerging Community Leaders.** The Community Action Model steps are driven and implemented by the Emerging Community Leaders. The Project Coordinator role is to work from existing ECL knowledge and skills to train and guide the implementation of the 5 steps. Project Coordinators often must strike a balance

of stepping back to give space for ECL decision-making, planning and implementation or alternatively stepping up where ECLs are struggling in order to complete activities to meet deliverable timelines and to move the project along. The Project Coordinator's time with ECLs during workshops is limited and valuable, so work can go rather slowly if it is expected that ECLs solely be responsible for all the CAM activities. Ultimately, Project Coordinators are the ones who submit reports and deliverables to their Funding Agency and spend nearly a full-time work week on the project. One way to help Project Coordinators navigate their roles is by providing a breakdown of their responsibilities and the roles of ECLs (See our example in Setting up the CAM, page 49). Several analogies may be helpful in explaining the role of Project Coordinator and ECL. The Project Coordinator can be seen as the staff, while the ECLs are the board members of a Community-Based Organization; the Conductor (PC) to an Orchestra (ECLs); or Coach (PC) to a Basketball team (ECLs). Similar to a leader who looks to build upon the skills of their team, the PC has been known to ask those ECLs who are skilled at communication to form a media subgroup or those who are good speakers to serve on a subgroup to plan out presentations to stakeholders. The Project Coordinator does the heavy lifting and important in-between work from week to week, such as planning meetings and trainings, providing project management support to the ECL team, initiating any communication with outside stakeholders, and seeking technical assistance support from the Funding Agency. A good Project Coordinator (coach) knows how to also tap into and build on each individual ECL's strengths, skills and knowledge.

8. **Transition is very common(!) for Project Coordinators so develop strategies to maintain progress for each CAM project.** Project Coordinators may change from year 1 to year 2 or anywhere throughout the entire process. We have found that changes between Project Coordinators for

a CAM project can disrupt and lose the momentum for a CAM project. Often information and documents are not fully transferred from one Project Coordinator to the next. Replacement Project Coordinators hold a challenging role as they onboard themselves to an existing CAM project, acclimate to their new employer organization, and build trust and rapport with a team of ECLs. To address the often abrupt change or lack of transition, we developed TWO onboarding documents to ensure that outgoing staff can transition knowledge and processes to their predecessor Project Coordinator.

- **Onboarding Checklist for CAM Project Coordinator:** Transition activities to be used by a Project Coordinator or other staff to ensure proper documentation and transition of their CAM project.
- **Onboarding Checklist for CAM Funding Agency:** When a potential transition is announced, CAM Funding Agency can use this list to support the CAM partner agency to ensure continued momentum in the project.

We also recommend that the Funding Agency staff assigned to support the CAM Partner agency meets with any outgoing Project Coordinator and their supervisor to identify a timeline for transition, as well as multiple on-boarding meetings with the new Project Coordinator.

Convening & Training the CAM Cohort

9. **Develop a cohort culture of CAM Project Coordinators that meet regularly to support one another, collaborate and trouble shoot issues**. During monthly Project Coordinator meetings, we recommend that the Funding Agency provide opportunities for PCs to not only share progress and challenges with their peers, but also give space for them to offer to their peers support, suggestions and opportunities for collaboration. This creates a peer-learning and collaborative environment in which everyone is an expert and can provide technical assistance,

not just the Funding Agency. Additionally, having a cohort allows PCs to collectively express any technical assistance and training needs or offer their feedback on the implementation of the CAM program. Several times our team has modified deliverables due dates or given additional guidance because the Project Coordinators (PCs) bring issues to our attention. In some instances, agencies have teamed up for joint applications to CAM to bring a well-rounded project together.

10. **Develop a training schedule for CAM Project Coordinators and Emerging Community Leaders for the year, but hold it loosely and allow input and changes.** Initially, the trainings for CAM Project Coordinators and their Emerging Community Leaders were minimal, typically only at the beginning of each step. Staff stepped in and provided customized one-on-one training support. However, in the more recent cycles of CAM, Project Coordinators asked for more trainings for themselves, and their teams to complete different aspects of the CAM. In response, SFTFP developed an official training schedule with opportunity for Project Coordinators to provide input and changes to the schedule based on their needs and skill set. Every six months or so, we showed them the training schedule and topics for each monthly All CAM Project Coordinator meetings, which includes meetings with no set topics, so that they can provide insight on adjustments or ideas for trainings and topics.
11. **Provide opportunities and support for CAM Project Coordinators to plan and develop their trainings and workshops together.** In previous CAM cycles, the SFTFP team focused on providing support and training to Project Coordinators almost exclusively on implementing the steps of the CAM. However, Project Coordinators must translate what they learn into workshops to support their ECL team in implementing the steps. We found that some PCs had more experience than others in developing and facilitating workshops or that PCs were often developing their

trainings a few days ahead of time. We began to require PCs to develop 6-month training plans and we as the Funding Agency will also provide written versions of potential training sessions. The PC can then take these proposed trainings, for example on a topic like "Tips to using Survey Monkey," and review, refine and tailor it to meet the needs of their group. We provide time in our meetings for Project Coordinators to discuss and share their curriculum plans with one another, offer up their own workshops to support one another, and discuss how they would tailor workshops offered by SFTFP. In this way, PCs shine by highlighting their expertise of engaging and developing community leaders. They shared their workshops focused on other aspects of community leadership, such as team building activities or participating in campaigns outside of CAM, or creative ways to engage their team in the work, such as neighborhood walks or guest speakers.

12. **A regular communications system, such as email or newsletter, to Project Coordinators is recommended**. We suggest developing a channel or forum for the Funding Agency to regularly communicate to CAM partners about upcoming meetings, remind them of deliverable due dates, news and emerging public health resources, and encourage communication and updates between agencies. Using a communications hub, like Group Site or Base Camp, was an innovation our team attempted, but it was not largely successful due to low uptake and use by CAM partner Project Coordinators even when they were offered incentives to do so. On the other hand, it was useful to have some manner of cloud storage such as a location for files- deliverable templates, and a location for PCs to turn in completed item, etc.

Implementation of CAM Program by the Funding Agency

13. **Designate a CAM Program Manager to guide, adapt and integrate quality improvement of the overall CAM process**. Flexibility is required in

implementing a community-driven process, there will be times when the prescribed process of CAM simply cannot stay on a scheduled timeline or where additional activities need to be inserted. To steer and adapt the CAM process, we recommend that the CAM Funding Agency designate one CAM Staff Lead to manage the CAM and to oversee and plan the whole CAM program implementation. This staff would have a bird's eye view of the CAM program, coordinate other staff, and communicate any workplan and timeline changes to CAM partners. They would plan internal team meetings, make tweaks to timelines and deliverables, support other Funding Agency staff with technical assistance, and gather, document and incorporate evaluative feedback about the CAM process. In some iterations of the CAM cycle, this staff person was not assigned to provide technical assistance and support to a specific CAM partner agency while in other cycles they were. We did find value in having the CAM Program Manager also experiencing a one-on-one relationship with at least one partner agency in order to be more rooted in the work.

14. **CAM can be executed using different timeframes, but we strongly recommend a 2-year cycle on a fiscal year timeline.** Even with two years, completing all the steps of CAM and meaningfully engaging ECLs through the process can be very challenging. Engaging youth adds complexity due to school calendars, vacations, exams, and training needs for young people. A 2-year cycle has worked fairly well with our projects and we have regularly offered one year of funding at a time to ensure proper advancement of the project. We hold a sincere hope of continuing on with each partner agency for a second year upon advancement of project goals. Initially CAM ran the calendar year- starting in January for the first year continuing through December. In recent years we had determined this confuses both the DPH and non-profit funding cycles, budgets, and plans for staffing. It is recommended that CAM cycles

(July–June in San Francisco) match a standard funding cycle often used by non-profits and government agencies in your jurisdiction.

15. **Find the right balance of number of deliverables for each CAM Step to encourage planning and execution of activities.** Some iterations of CAM had limited deliverables, which proved challenging for grantees. Without the structure of taking smaller steps moving toward completion of a next part of the process, some grantees can lose focus. For this reason, we have structured a variety of deliverables to be due throughout the funding process, including the previously more nebulous Step 4: Action. At the same time, past CAM iterations have included an excessive amount of deliverables (something due monthly) which defeated the purpose of our funding a process, becoming more like a monthly report. Use feedback from PCs to learn what deliverables make sense and what deliverables can be scaled back or completed with the support of the Funding Agency Staff through a phone call or in person meeting.

III. Training & Technical Assistance

Types & Structure

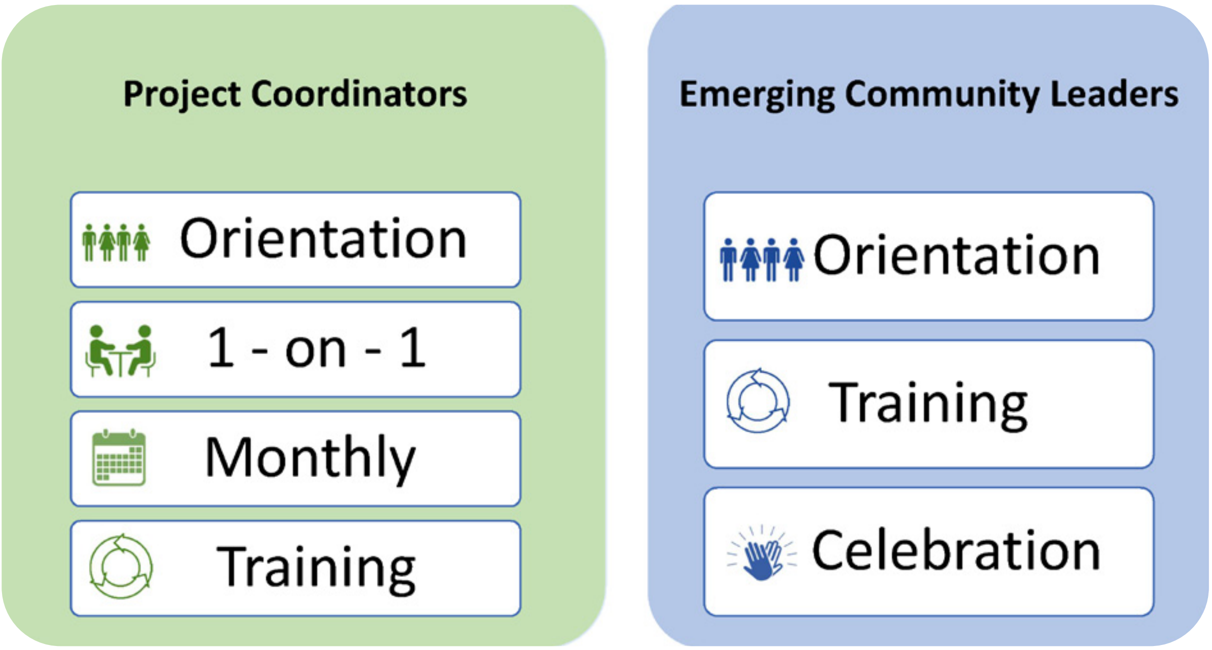
One of the goals of the Community Action Model is to build the capacity of Emerging Community Leaders. In the San Francisco's CAM Technical Assistance and Training Structure, we do so by training and supporting their Community-Based Organization staff, who then develop and tailor trainings to build the leadership of their team of Emerging Community Leaders. Therefore, it is vital that there is ongoing support and technical assistance offered to the partner agencies throughout the 5 steps of the CAM, with the ultimate goal of building capacity and setting up the partner agencies for success. The Funding Agency provides direct support to the partner agencies, but also hires Outside Trainers and Consultants to provide tailored trainings, as well as coordinates time/space for the partner agencies to provide peer support for each other.

This document shares how we have developed and set up our Training & Technical Assistance structure and best practices; however, we recommend that other CAM Funding Agencies customize and try on different structures to fit the needs of your funded Community-Based Organizations and their Emerging Community Leaders.

Take a look at the CAM Training & Meeting Schedule on page 304 to see how we schedule these out for the 2-year CAM Cycle.

Funding Agency Provides 5 Types of Training & Technical Assistance to:

- Project Coordinators (PCs in GREEN)
- Emerging Community Leaders (ECLs in TURQUOISE)



Orientations for Project Coordinators (PCs) and Emerging Community Leaders (ECLs)

The Funding Agency plans Orientations for the partner agency PCs at the beginning of Step 1 and Step 4, as well as Orientations for the ECLs of all the partner agencies at Step 1 and Step 4. Step 1 and Step 4 take place at the beginning of each cycle, when there is often a transition of Project Coordinators or Emerging Community Leaders. The Orientations are important to set the foundations of CAM, to provide opportunities for ECLs from the different partner organizations to meet each other, to build identity and a cohort/community, and be FUN!

Resources in this Toolkit: Example PC Orientation Agenda (Page 350)

One-on-One Check-Ins and Technical Assistance with Project Coordinators

One designated Funding Agency staff should meet at least monthly one-on-one with the Community-Based Organization PC to provide additional guidance and support. These monthly check-ins, usually about an hour long, provide additional opportunities to build relationships with the PC, and give time and space for them to provide updates, ask questions and get personalized support. If possible, meet in-person monthly, and rotate locations, so the Funding Agency becomes familiar with the CBO's site. PCs should also set the agenda for each check-in and the Funding Agency should be prepared with reminders or upcoming items and discussion for the meetings. We also recommend that the Funding Agency should attend at least one ECL meeting per year of each of your partner agencies – to get to know the ECLs, as well as offer any additional support. Staff also provides additional support and technical assistance when needed, based on the updates and needs from the partner agency. The Funding Agency should make the decision to meet or check-in twice a month if needed, especially during Step 4 a lot of support and direction is needed, and things can move quickly.

Resources in this Toolkit: See example One-on-one Check-in Agenda.

Monthly All CAM Project Coordinator (PC) Meetings

The Funding Agency provides and coordinates a recurring monthly time, approximately 2 hours long, for all Project Coordinators to meet. These meetings are a valuable time to have PCs provide project updates, go through deliverables, and answer questions. The Funding Agency also plans activities for peer learning and support during these meetings, as well as bringing in guest speakers or trainers. The topics and learnings objectives for each month are sketched out in advance with room for PCs to provide input and adjustments. Having a set monthly meeting helps build relationships with the Funding Agency staff and the PCs, as well as a cohort between the PCs/partner agencies.

Resources in this Toolkit: Example Monthly All CAM PC Meeting Agenda (page 345)

Step-Specific Workshops for Project Coordinators (PCs) and Emerging Community Leaders (ECLs)

The Funding Agency directly trains both PCs and ECLs on core Step-Specific workshops and other key skills.

Project Coordinators: Before or at the beginning of each CAM Step, a Partner PC Step Training is organized by the Funding Agency to prepare the PC, equip the PC with workshop series curriculum if applicable, and review the deliverable(s) required for that Step (using the two-tiered training model (train-the-trainer) described in the CAM Step 1 Guide). These trainings or workshops can take place during the Monthly All CAM Project Coordinator Meetings, or a separate training time can be organized. Additional Train-the-Trainer Workshops to Build Capacity & Skills of PCs may be needed in addition to Step-Specific training. For example, Project Planning, Midwest Academy Strategy Chart, and Framing & Messaging trainings are needed to build the capacity of PCs and their ECL teams in complete the steps of the CAM. Additional skill building workshops are important to supplement CAM capacity building efforts throughout the cycle, and can be generated on request of Project Coordinators. Examples include Project Management, Local Policy & Government, Meeting with Stakeholders, Professional & Career Development. Ask for input from PCs of what types of training they need/want at the beginning and throughout the cycle to help with planning, by using a partially filled out training schedule and suggested topics.

Emerging Community Leaders: To provide consistent information to the partner agency ECLs, the Funding Agency often contracts Outside Trainers or Consultants to conduct Step-Specific or Skill Building trainings for ECLs. For example, for Step 2, all ECLs need a foundation of the types of diagnosis methods in order to conduct their own primary research. The Step-Specific ECL Trainings should take place at the beginning of each step, except for Step 1 and Step 4 because there is already consistent information being shared during the ECL Orientations. Depending on how many partner agencies are being funded, and how many ECLs there are per partner agency, the ECL Training may need to be conducted multiple times to accommodate for group size. We recommend no more than 20 persons per training/group, this typically means two (2) CAM Teams. For example, if there are 6 funded agencies with 8 ECLs each, break them up into 3 trainings, so there will be a manageable number of 16 ECLs per group/training and their PCs. This also allows for opportunities to mix and match partner agencies together, so ECLs can get to know other groups' ECLs. It is also important to get input from each partner agency's PC on their ECLs availability when planning these trainings.

Resources in this Toolkit: See the CAM Step 1–5 Workshops & Guides in Section IV (page 360), and the PC Training Schedule Example (page 304).

Showcase & Celebration at End of the Year

It is also very important to celebrate the successes of the Emerging Community Leaders and Project Coordinators work each year and lift up the new skills of the ECLs. The Funding Agency plans a CAM Showcase and an end-of-CAM Celebration to provide a space for the ECLs, PCs, and other community partners to come together. The CAM Showcase takes place after Step 3 in the first year, and it is recommended to have the ECLs present about their primary research findings from Step 2 and 3. The end-of-CAM Celebration takes place at the end of the second year. Project Coordinators and Emerging Community Leaders share about their successes throughout the 5-steps, emphasizing their Step 4 tactics, Demonstration Project, and if they were able to — their PSE change. It is important to have the PCs help in the planning of these Celebration events to help make it relevant and fun for their ECLs, like music, food, photobooths and more.

- **Resources in this Toolkit:** See Showcase & Celebration Handout in Setting Up the CAM

- In the CAM Training and Meeting Schedule Example, **Showcase & Celebrations at End of Year** and denoted with a clapping hands icon

Frequency of Training and Technical Assistance Support

Beginning of Each CAM Cycle

- Project Coordinator Orientations - Step 1 &4
- Emerging Community Leader Orientations - Step 1 & 4

Per CAM Step

- Train the Trainer Workshops for Project Coordinators
- Additional Trainings for Project Coordinators
- Trainings for Project Coordinator and Emerging Community Leaders (outside trainers)

Monthly

- One-on-One Technical Assistance
- Monthly All CAM Project Coordinator Meetings

End of Each year in CAM Cycle

- CAM Showcase or Celebration Event

Working with Outside Trainers and Consultants

Outside Trainers and Consultants are important to help the Funding Agency to support CAM and the partner agencies. They can provide:

- Train-the-trainer Step-Specific or Skill Building Trainings for PCs
- Step Trainings or Skill Building Trainings for ECLs
- Tailored TA, especially during Step 2 and developing their primary research tools

Best practices about working with Outside Trainers & Consultants:

1. **Provide context to the Community Action Model and where the PCs/ECLs are at well before the scheduled training**. It is important that Outside Trainers and Consultants are aware of the larger picture of CAM, so they can help the PCs and ECLs connect the dots of why the scheduled training is important, and how it directly applies to the partner agencies' work
2. **Make sure that Funding Agency staff can attend the scheduled training to help connect dots** if needed, support the Outside Trainers & Consultants, and to provide a familiar face to the partner agencies, PCs and ECLs. Often times, the Funding Agency staff introduces the Outside Trainers & Consultants at the beginning of the scheduled trainings.
3. **In planning for the scheduled training, the Funding Agency should collaboratively discuss and set the agenda with the Outside Trainer & Consultants.** Some outside Trainers & Consultants have pre-set workshops already created that may not fit the needs of CAM. We recommend that Funding Agencies identify key learning objectives for the training with Outside Trainers, and ask them to provide a draft facilitator agenda at least two weeks before the training. Then the Funding Agency staff can provide edits and feedback through email or an additional phone call to further refine the training.
4. **Work with the Outside Trainer & Consultants on a shared vocabulary to avoid jargon and using different terms for the same thing.** CAM already has a lot of terms that can be confusing for PCs and ECLs, so the Funding Agency should be sure to review the materials or slide decks of the Outside Trainer & Consultants prior to the training.

Fostering Peer Support Among CAM Project Coordinators

It is highly recommended that the Funding Agency intentionally foster peer-support among CAM Project Coordinators of the partner agencies. The Funding/

Training Agency or Outside Trainers & Consultants do not hold all the expertise. Project Coordinators have vast experience in youth development, tailoring, facilitation, program planning, and just knowing what would or would not work for their ECLs. The PCs can learn a lot from each other, share resources, icebreakers, agendas, activities, and workshop successes and challenges.

Opportunities for PC Peer-Support that the Funding/Training Agency can foster:

- During Monthly All PC Meetings
- Online communication/collaboration - for example, Groupsite or another online discussion forum
- Supporting each other at ECL Orientations and Trainings
- Combining or co-facilitating ECL weekly workshops, or presenting at each other's ECL meetings
- Attending each other's agency events, Demonstration Projects, presentations, etc.
- Supporting each other's social media, ex. "liking" each other's pages and handles.
- One-on-one PC meet ups or informal help with each other

The easiest way that the Funding Agency can foster peer PC support, is to always include some sort of activity or space for the PCs to work together during the Monthly All PC Meetings. Project Coordinators can provide updates on their CAM projects, share successes and challenges, and help each other solve any issues, as most likely they are facing the same things. See Sample All CAM PC Meeting Agenda and Workshop Activity Types

10 Best Practices for Training & TA Support

1. **Develop a CAM Training Schedule and map out the different types of support per month on a calendar at the beginning of the cycle.** The lead staff of the partner agency should work with the PC to spread out their support/technical assistance throughout the month, when scheduling regular meetings at the beginning of the cycle. For example, don't schedule regular PC One-on-One meetings the same week as the regular Monthly All CAM PC Meetings, or schedule the Monthly All CAM PC Meetings the same week of the month as other required meetings. Try to also map out PC and ECL Step-Specific trainings to not occur the same week as Monthly All CAM PC Meetings if possible.
2. **Reiterate at the beginning of each cycle the FTE expectations of Project Coordinators to their CBO leadership.** Often, Community-Based Organizations have many different programs and activities that staff get pulled into. On the other hand, the CAM program provides a lot of regular meetings and trainings that are required for PCs to attend as well as their own ECL workshops and implementation of each step.
3. **If you aren't sure about how a training or meeting will land with ECLs, ask the Project Coordinators!** Project Coordinators are experts of their communities and ECL groups – they know what will work with their ECLs. For example, ask PCs to provide input and help with ECL trainings/orientations, and possibly own/lead parts of the agenda.

4. **For any train-the-trainer workshops, provide tangible materials or activities for the PCs to apply and tailor for their team.** For example, PCs found it helpful to have some pre made workshop or curriculum to tailor them to their own ECL groups. If possible, the Funding Agency can provide space for PCs to role play and practice the workshops or activities, possibly during the Monthly All CAM PC Meetings.
5. **Use technology for some sort of collaborative communications amongst the PCs.** The "Groupsite" platform has worked in San Francisco to an extent, but either all the PCs have to use it or it doesn't work. Try incentivizing the PCs to use the technology (ex. whoever posts the most this month gets a prize). One of the best features of Groupsite is that it has allowed for one space for all documents, deliverables and other materials to be kept and shared. Google Docs, Microsoft Teams, and similar platforms could also be used for this aspect. As for reminders and other communications, a combination of email, Groupsite, and text has been most effective.
6. **Use technology that can record, so that PCs can watch and re-watch information.** This can be helpful for virtual trainings and reviewing deliverable documents. You can use Zoom or another webinar or conferencing technology.
7. **Make trainings and meetings fun!** Provide good food – ask the PCs what kind of food they like (and what kind of food their ECLs would like), and be sure to rotate cuisines (especially for the Monthly All PC Meetings – the same food will get repetitive). PCs also love to provide input on any schwag that will be given out to ECLs — some popular items have been CAM branded sunglasses, Pop sockets, and notebooks. ECLs also like to design group t-shirts for their project teams to build identity and unity and wear to presentations/meetings.
8. **Hold monthly internal Funding Agency CAM staff meetings in which lead staff and the CAM Program Manager can discuss the partner agencies'**

Meeting, Training & Deliverable Schedule

Example

Please see CAM Partner Agency Training & Technical Assistance Types & Structure document (page 293) for more information and descriptions of the types of trainings & TA.

Step 1: Train Participants, Name the Issue & Choose Area of Focus (July–October)				
Type	**Date**	**Time**	**Workshops**	**Deliverables**
Monthly One-on-One Check-ins & TA for PCs	Ongoing	1 Hour	One-on-one Check-ins with Staff, Start August	
Project Coordinator (PC) Orientation Day 1	End of July	6 hours	• CAM Orientation & Deliverables • Health Equity and Public Health • Tobacco and Social Justice • SF Tobacco-Free Coalition	
Project Coordinator (PC) Orientation Day 2	End of July	6 hours	• CAM Tobacco Topics • Co-learning among CAM Partners • ECLS: Recruitment, Training, Maintaining • CYAN Youth Development Framework	
Monthly All CAM PC Meeting Monthly All CAM PC Meeting	August	1.5–2 Hours	• ECL Recruitment Strategies • Setting up Systems for ECLs • Curriculum Development • Project management	Aug–Dec Curriculum Plan + Workshop
Partner PC Step 1 Training	September	3–4 Hours	Workshop Facilitation & Development	

Monthly All CAM PC	September	1.5–2 Hours	• CAM Recruitment Updates • Curriculum Development • ECL Orientation Planning	ECL Pre-Survey
Emerging Community Leader (ECL) Orientation	End of September	4–5 hours	• CAM Orientation • Health Equity and Your Community • Tobacco as a Social Justice issue • Meet ECLs from Other Organizations	
Monthly All CAM PC Meeting	October	1.5–2 Hours	• Diagnosis Plan Tool • Diagnosis Tool Kits & Curriculum	

Step 2: Define Design & Do Diagnosis (November–February)				
Type	**Date**	**Time**	**Topics**	**Deliverable**
Monthly One-on-one Check-in	Ongoing	1 Hour	One-on-one Check-ins with Staff	
Partner PC Step 2 Training	October	4 Hours	• Participatory Action Research • (Outside Trainer)	Diagnosis Plan Part 1
ECL Step 2 Training	Late Oct	3 Hours	Diagnosis Methods 101* (Outside trainer)	
Step 2 Trainings	December–February	1.5–2 Hours	1:1 support and training for specific data collection methods per organization	
Monthly All CAM PC Meeting	November	1.5–2 Hours	Conducting Diagnosis with ECLs	

Monthly All CAM PC Meeting	December	1.5–2 Hours	Diagnosis Implementation Collaboration	• Diagnosis Plan Part 2 • ECL Tracking & Training Tool & Curriculum for Jan–June
Monthly All CAM PC Meeting	January	1.5–2 Hours	Diagnosis Implementation Updates & Technical Assistance (ex. Key Informant Interviews)	
Monthly All CAM PC Meeting	February	1.5–2 Hours	Diagnosis Implementation Updates & Technical Assistance (Surveys, etc.)	Step 2 Progress Report + Data Analysis Part 1

Step 3: Analyzing and Disseminating Community Diagnosis (March-June)

Type	Date	Time	Topics	Deliverables
Monthly One-on-one Check-in	Ongoing	1 Hour	One-on-one Check-ins with Staff	
Partner PC Step 3 Training	Late Feb/ March	2–4 Hours	Data Analysis Workshops: Qualitative & Quantitative	
ECL Step 3 Training	March	3 Hours	Developing key messages with data (Outside Trainer)	
Monthly All CAM PC Meeting	March	1.5–2 Hours	Data Analysis TA & Support	
Monthly All CAM PC Meeting	April	1.5–2 Hours	• Developing presenta-tions: key messages & visuals • CAM Showcase logistics • Support on Step 3 Deliverable	Data Analysis Part 2
CAM Showcase/ Jam	May	2 Hours	• ECLs present key find-ings to key stakeholders • ECLs are honored for their work	

Monthly All CAM PC Meeting	May	1.5–2 Hours	• Debrief showcase, community presentations • Ending well with ECLs	
Monthly All CAM PC Meeting	June		• Final Reporting requirements • Appreciation	• ECL Post Survey • PC Key Informant Interview • Final Report • ECL Tracking & Training

Step 4: Select and Implement Action Plan (July–June of Year 2)

Type	Date	Time	Learning Objectives	Deliverables
Monthly One-on-One Check-In	Ongoing	1 Hour	• One-on-one Check-Ins with Staff	
Monthly All CAM PC Meeting	July	1.5–2 Hours	• Develop a strong foundation for Step 4 for you and your ECL team • Define roles and expectations for PCs, lead ECLs and ECLs • Co–develop a training calendar for PCs for the year	
Step 4/Year 2, PC Orientation Day 1	August	5–6 Hours	• Understand CAM Step 4–5 timeline and deliverables • Define Action/ PSE, Tactic and Demonstration Project • Action and PSE Workshop*	

Step 4/Year 2, PC Orientation Day 2	August	5–6 Hours	• Identify strategies to plan, tailor and facilitate workshops for ECL team • Project Planning & Management* • Youth and ECL Recruitment, Team building	
Monthly All CAM PC Meeting	August	1.5–2 Hours	• Develop and collaborate on your ECL work-shops and ECL training calendar • Practice facilitation skills • Plan for ECL Orientation	August–December Curriculum Plan + Workshop
Step 4/Year 2 ECL Orientation	End of September	4–5 Hours	• CAM Step 4 Overview –Building Power & Campaign Tactics* • One–on–One meeting workshop*	
Monthly All CAM PC	September	1.5–2 Hours	• Action Idea Presentations • PSE Recommendation Development • ECL Orientation Planning	• ECL Pre Survey • Action Ideas & Rationale
PC Training-Mid West Academy Strategy chart	September	4 Hours	• Create and use the MWASC to win a campaign • Train your ECLs on MWASC to develop the Action Plan	
Monthly All CAM PC Meeting	October	1.5–2 Hours	• Develop a compelling educational packet • PSE Recommendation Development Workshop	Final Action & Midwest Academy Chart
Monthly All CAM PC Meeting	November	1.5–2 Hours	• Workshop Series: Develop, plan and evalu-ate your Demonstration Project Plan with your ECLs	
PC Training-Project Planning with Youth	December	4 Hours	• Project Planning with Youth (outside trainer)	• Action Plan Part 1 • Educational Packet • Curriculum Plan Jan–June

PC Training-Framing & messaging	January	1.5–2 Hours	• Develop and Frame key messages for your media campaign	
ECL Training-Social Media Plan	January	2 Hours	• Develop a strong media strategy plan to tell your story, mobilize community and compel decision–makers (outside trainer)	
Monthly All CAM PC Meeting	February	1.5–2 Hours	• Meetings with Elected Officials/Stakeholders (outside trainer)	Action Plan Part 2
Monthly All CAM PC Meeting	March	1.5–2 Hours	• Demonstration Project check–in and reporting • Amplifying CAM Partner's Social Media	
Monthly All CAM PC Meeting	April	1.5–2 Hours	• Action and sustainability planning (step 5)–What is your impact/legacy? • Communicate accomplishments and successes with ECLs	Action Progress Report
Monthly All CAM PC Meeting	May	1.5–2 Hours	• Discuss and utilize strategies to support ECL /PC career and educational development	Demonstration Project Report
ECL Celebration & Close Out	May	2–3 Hours	• Presentations by organizations • Honoring ECLs	
Monthly All CAM PC Meeting	June	1.5–2 Hours	• Reflect and celebrate CAM success and you! • Upcoming in CAM	• Final Report • ECL Tracking & Training • ECL Post Survey

Workshop Activity Types

The Community Action Model is rooted in popular education, capacity building, and culture of learning and reflection, in which participants and educators are co-learners. The Funding Agency has the responsibility to keep these values and ensure that meetings, trainings, workshops, and orientations that are provided to PCs and ECLs are interactive, put the participants at the center of learning, and provide space for participants to think critically on their own. A lecture-based training where the educator stands in front of the room to tell the participant what to learn is not rooted in popular education. When designing an agenda, for example for a Monthly All CAM PC meeting, use the Workshop Activity Types in this document to spur interactive learning, idea generation, reflection, and reaching group consensus. Model and encourage the use of different Workshop Activity Types during Monthly All CAM PC meetings or other PC trainings so that PCs become confident to facilitate them with their own ECL groups. Feel free to also share this document with the PCs at the beginning of the CAM cycle.

*Adapted from SOUL (School of Unity & Liberation) worksheet: “19 Types of Workshop Exercises”

For this document, we have organized the Workshop Activity Types by starting from Group workshop activities to Individual workshop activities down along a spectrum. When designing an agenda, we recommend mixing up the activities to include both group and individual activities. Also, each Workshop Activity Type has different strengths and weaknesses, and when designing an agenda, the Funding Agency should think about what the learning objectives are of the workshop and matching these objectives to the audience/participants. In general, each Workshop Activity Type will provide participants space for and spur:

Interactive Learning: Activities that are best for Interactive Learning put the participants at the center of learning, promote peer-to-peer knowledge exchange, and bring new shared knowledge to the larger group

Idea generation: Activities that are best for Idea Generation reiterate the participants' individual experiences as expertise, and often includes a facilitator who helps guide the conversation and/or helps find themes

Reflection: Activities that are best for Reflection draw out individual knowledge & experiences and can help build individual growth, group rapport, and start conversations/ideas

Group Consensus: Activities that are best for Group Consensus bring together the opinions of the individuals in the group, and help the group make a collective decision

Workshop Activity Type	Best for...
Group Share/Group Brainstorm **How to:** • Facilitator puts out a question. • Group throws out ideas or responses to the question. • Responses should be recorded clearly on butcher paper. Facilitator can record ideas or responses or can ask for a volunteer to record. Recording can be through words or drawings. • Ends with facilitator synthesis. **Tips:** • Brainstorms should be done from a specific question, which should be worded precisely ahead of time. Remember to think of where your audience/participants are at – for this type of activity, the question should be something they already have some knowledge or experience of • If there are little or no responses, or you sense shyness, facilitate the conversation by reframing or breaking down the question into easier parts that your participants can more easily answer; or require that everyone goes around to share; or switch to a different activity type (that may include written responses instead). • Always conclude with a facilitator synthesis, including why you did the brainstorm and a summation of core concepts. • If appropriate, keep the butcher paper with responses to build upon for follow-up workshops (like doing the Dot Voting Activity!) or additional questions.	Idea Generation Reflection **Specific example:** During a Monthly All CAM PC meetings, Funding Agency poses a question to PCs around how to solve a challenge they are facing with their ECLs or during a specific part of a Step.

Workshop Activity Type | **Best for...**

Stand Up/Sit Down or Step Up/Step Back

How to:

- Facilitator reads out statements.
- Stand Up/Sit Down version: Participants start seated. If the statement is true for a participant, they stand up and if not, they stay seated. Facilitator has the participants observe how the group responds to each statement.
- Step Up/Step Back version: Facilitator has participants stand and line up in a line. If the statement is true for a participant, they step forward and if not, they stay in the line. Facilitator has the participants observe how the group responds to each statement. Before the next statement is read, have all the participants step back into one line. Facilitator has the participants observe how the group responds to each statement.
- Facilitator can ask for observations from the group. Facilitator summarizes observations or agitate to conclude.

Tips:

- This is a good activity to introduce a new topic, and do at the beginning of a workshop, as it also can be doubled as an icebreaker/group bonding activity. Mix up the statements so some are personal/reflective and some are for fun.
- This is also a good activity for the facilitator to physically see (and also have the whole group see) the opinions of the participants without having to force the participants to talk or write responses. If applicable, the facilitator can point out any group consensus or areas where the group disagrees to spur further discussion.

Best for...

Interactive Learning

Reflection

Group Consensus

Specific example:
Funding Agency or outside trainers want PCs or ECLs to know the difference between policy, system and environment changes a facilitate a Stand Up/Sit Down Activity using examples in the real world — if they have experienced them in their community or not

<table>
<tr><th>Workshop Activity Type</th><th>Best for...</th></tr>
<tr><td>
Post-Its

How to:
• Facilitator puts out a question, and gives the participants time individually or in small groups to write down responses and ideas. There can be multiple colors of post-its that the facilitator provides instructions to write certain ideas in one color and other ideas in another color
• Individuals or recorder of the small group writes one idea per post-it
• Facilitator sticks post-its on board or butcher paper, puts similar ideas together/discuss themes so the group can see and can give suggestions on groupings.
• Facilitator summarizes observations or agitate to conclude.

Tips:
• If it is a larger group of participants, think about using big post-its or larger pieces of paper written in sharpie/marker to stick on the wall, as it gets hard for the group to see participants’ responses when putting them into themes
• If appropriate, keep the grouped/themed post-its responses to build upon for follow-up workshops (like doing the Dot Voting Activity!)
</td><td>
Interactive Learning

Idea Generation

Specific Example:
Funding Agency or outside trainers want to define a new term to a group of PCs or ECLs and facilitates a Post-it Activity. The facilitator breaks down the term and asks participants what it means to them, groups the responses and synthesizes to reach a shared definition with all the participants.
</td></tr>
</table>

Workshop Activity Type	Best for...
Dot Voting **How to:** Facilitator determines how many sticker dots are given out to each participant for voting, dependent upon how many items there are. Directions usually include putting only one dot/voting only one dot per item. Participants make individual decisions on where they want to place their dots during the allotted time After voting process is complete, facilitator synthesizes and can ask for observations or comments from the group, especially if there are clear standouts with lots of dots, or vote-splitting. **Tips:** Build upon a Group Share/Group Brainstorm or Post-It activity. Once the group shares all the ideas on butcher paper, facilitator can use a Dot Voting activity to then get group consensus or prioritize or items that rise to the top. Avoid similar or related options, as these can cause vote-splitting. This may require you to have a discussion and combine options, and possibly have to re-vote Provide multiple dots color options for both positive (for example a green dot) and negative responses (for example a red dot), which will allow you gather even more information.	Group Consensus **Specific example:** PCs facilitate a Dot Voting activity with their ECLs during Step 3 to narrow down key findings from their Diagnosis/ primary research to the top 3.

Workshop Activity Type	Best for...
Gallery Walk **How to:** Facilitator prepares "stations" around the room with information and/or prompt(s). and can include images, documents, problems, data, quotes, etc. (be creative!). Each station should have extra blank butcher papers posted for responses. Depending on the participating group size, it is recommended to have at least 4 "stations". Facilitator puts participants in groups to match the determined number of "stations". Each group starts at a different "station" and stays together throughout the workshop. Facilitator determines how much time is allotted for the group to spend at each "station", depending on how much time is available. At the "station", the participants in the small group will read the posted information and prompt(s) and discuss. A recorder can then write the group's responses/thoughts on the butcher paper. Or another option – the individuals of each small group can write their own responses/thoughts on the butcher paper at each "station". After time is up, have the groups rotate to the next station. Participants can read the previous group's responses, and add content of their own and can add a check mark for a response that the new group agrees with. Repeat rotating until all groups have visited each station. Facilitator has participants go back to their first station to read all that was added to their first responses/thoughts. Facilitator then brings the large group back together for discussion – have a representative from each group present the top responses/thoughts with the most checkmarks. Facilitator synthesizes and summarizes, and helps group come to group consensus (if needed). **Tips:** If multiple staff or "station" experts are available, post one at each "station" like artists at an art gallery. They can help facilitate the discussion, share additional information/their expertise and answer any questions. There are many options for this Gallery Walk Activity. If there is limited time, the facilitator can have each small group go to only one "station", and then the small group representative will summarize and share out responses/thoughts to the large group. Group consensus will need to be made at a later time using this option (like following up with the Dot Voting Activity!)	Interactive Learning Reflection Group Consensus **Specific example:** PC facilitates a Gallery Walk activity with their ECLs to gain feedback and begin deciding which endorsement form designs to move forward with in Step 4.

Workshop Activity Type	Best for...
Small Group Discussion/Brainstorm **How to:** • Facilitator breaks up large group into smaller groups. And set a certain amount of time for small group discussion/brainstorm. Facilitator can also ask that each small group determine a speaker and a recorder (if necessary). Recording can be through words or drawings. • Facilitator gives small group participants question(s) to discuss. The questions can be the same across the board for the larger group, or can vary for each small group. • Small group representatives report back in the large group. • Facilitator summarizes observations or agitate to conclude. **Tips:** • Facilitator should visit small groups to make sure participants are staying on task. • Split up groups by having participants count off so that friends who are sitting near each other are in different groups. • Depending on the question, to make things fun and get the small groups to respond quickly and with quantity – make it a competition! Facilitator should set a shorter amount of time for small group responses, and offer prizes for the winning team. For the competition version to work, the question must be simple. • If appropriate, keep each small group's responses written by the recorder to build upon for follow-up workshops (like doing the Dot Voting Activity!)	Idea Generation Reflection **Specific example:** PC facilitates a small group discussion with their ECLs and asks each group to draw & visualize what success would look like for their Demonstration Project.

Workshop Activity Type	Best for...
Role Plays **How to:** • Facilitator breaks up large group into smaller groups. Participants act out a scene using a pre-written script to illustrate a point or develop a skit without a pre-written script in a small groups. • Each small group performs the skits to the large group. • Facilitator leads a discussion or debrief. **Tips:** • Be sure to allot enough time, as skit planning can be time consuming. • As groups are planning skits, facilitator should visit groups to make sure that they are staying on topic and on time. • If time is limited, instead of breaking up into smaller groups, the facilitator can instead ask for volunteers from the larger group to read the scripts. Or the facilitator/other staff can perform the skit for the group • Scripts/role plays/skits that work the best at illustrating a point usually have 2 parts: before vs. after or what's correct vs. what's wrong.	Interactive Learning Reflection **Specific example:** Funding Agency or outside trainers facilitate a Role Play activity to PCs and ECLs during Step 4 to highlight the importance of showing decision-makers the feasibility of a solution to gain their support.
Scenarios **How to:** • Facilitator hands out scenarios to read. The scenarios can be the same across the board, or can vary for each small group. • Participants break into small groups to share reflections on the scenario and answer corresponding questions. • Participants report back to the whole group. • Facilitator leads a discussion or debrief. **Tips:** • Make the scenarios fun and relatable to your audience! • Facilitator should visit small groups to offer help and make sure groups stay on task.	Interactive Learning Reflection **Specific example:** PC facilitates a Scenarios activity with their ECLs and provides examples of actions/PSE changes versus tactics that have occurred in their neighborhood.

Workshop Activity Type	Best for...
Matching Game **How to:** • Facilitator prepares cards with terms (one color) and definitions (another color). • Facilitator gives one set of cards to participants - individually or in pairs/small groups. Participants match up terms and definitions either on a table or if tape is provided, on a wall/board. • The large group reconvenes and review correct answers by reading them out loud. **Tips:** • Make it a timed competition! • It is very important to for everyone to be on the same page around terminology — there is a lot of jargon in CAM & in the public health world. • Take note of terms/definitions that many participants get wrong, and revisit the terms/definitions throughout the workshop and future workshops • Facilitator can also expand the matching to the 5 different steps of CAM. Participants can match what activity or deliverable belongs in what step.	Interactive Learning **Specific example:** Funding Agency or outside trainers facilitate a Matching Game activity to PCs during a Step 2 Train-the-Trainer workshop to make sure everyone understands all the different types of primary research methods.

Workshop Activity Type	Best for...
Pair-Share **How to:** • Facilitator puts out a question. • Participants pair up, and share thoughts with one another on the question. • Each pair shares back out to larger group **Tips:** • Tell participants when it's time to switch people, when the time allotted is halfway through • Facilitator should visit pairs to make sure they stay on track. • Try to mix up pairs, so those that don't know each other well work together. If there is time, each participant can share thoughts with 2 (or more) pairs. • To make this more of a group activity, the facilitator can have participants break up into two even groups. One group makes a circle around the second group's circle, and the two groups face each other. The pairs then share their thoughts with each other in the allotted time. The facilitator then has the inner circle rotate/shift over one position so there is a new pair, and then repeat until everyone has shared with each other. This activity works better with a shorter time frame and more simple questions, almost like "networking".	Idea Generation Reflection **Specific Example:** PC facilitates a Pair Share activity with their ECLs during the beginning of Step 1, where each pair shares about where they grew up and why they decided to get involved with the project.
Video **How to:** • Facilitator introduces a video or audio to give a visual representation of the workshop material. • The video is followed by a facilitated discussion. **Tips:** • Do not use a video simply to fill time. • Curate segments carefully. Don't show segments that are too long. • Think about your audience! The video should be relevant and exciting. • Test and practice with technological equipment (and don't forget the sound!) ahead of time. • Questions can be provided to the participants beforehand to think about during the video.	Interactive Learning **Specific Example:** Funding Agency or outside trainers show a video clip of the Black Lives Matter movement at the Step 1 ECL Orientation to spur excitement/light a fire and connect it to CAM/public health work.

Workshop Activity Type	Best for...
Individual Brainstorm **How to:** • Facilitator puts out a question or prompt. • Individual participants do a brainstorm on paper, either individual loose-leaf papers or on large butcher paper. For individual brainstorms, facilitator should highly encourage drawing and visioning. • Participants can hang their ideas and/or drawings on the walls around the room and share with the large group, or share their loose-leaf papers with the large group. • Facilitator summarizes ideas/observations or agitate to conclude. **Tips:** • If appropriate, keep each small group's responses written by the recorder to build upon for follow-up workshops • Facilitator can provide notebooks to everyone in the group and have the Individual Brainstorm be an ongoing activity throughout the CAM process. Participants can write/draw continuously in their notebooks and can look back on their reflections. • Make it fun! Incorporate the Individual Brainstorm ideas on the loose-leaf papers into a Snowball Activity (see also the Icebreakers section of the Toolkit) — where each participant rolls up each of their ideas into a ball and throws into the middle of a participant circle. After the allotted time, everyone picks up different snowballs and reads the ideas to the larger group.	Idea Generation Reflection **Specific example:** PC facilitates an Individual Brainstorm activity to appreciate their ECLs during their last meeting of the cycle. The PC prepares brown paper bags and has each ECL draw/write on the bag their 1) name and 2) a memorable moment during the CAM cycle, or a skill they have developed. Once all the ECLs are done, display all the bags on a table. The PC then has each ECL write on papers/post-its some appreciations or specific things they will remember about each person - and put the papers/post-its in each person's bag (PCs should also participate). After everyone is done, each person can read their appreciations either during the meeting or take them home.

Workshop Activity Type	Best for...
Presentations and Lectures **How to:** • Facilitator presents information while participants listen. • Least recommended, but is sometimes necessary because of time constraints. **Tips:** • Focus on core concepts. • Encourage as much participation throughout the presentation as possible. Ask questions and have participants reflect on their experience • Use visuals (photos and videos) and audio to break up the presentation/Powerpoint/lecture • Use a conversational tone and accessible language. Avoid jargon! If new terms are necessary, be sure to define them and write them on the board • Don't just read the slides • Check for understanding, summarize and repeat as necessary. • Make it fun with Kahoot! Quiz game in between sections or at the end of the presentation: www.kahoot.com	**Specific example:** Funding Agency teaches new agencies how to set-up and implement the CAM in their cities/counties.

Icebreakers

For Large Groups

ECLs trainings or Orientations

1. Four Corners

- **Time needed**: 10–15 minutes
- **Group size:** 6–20 people
- **Materials needed:** Four signs for your 4 corners (labeled 1, 2, 3, 4), Tape to hang signs, List of categories. You will also need enough room for the group to move around.

INSTRUCTIONS:
Hang the signs in each corner. Be sure the numbers are **LARGE** and easy to see.

Facilitator say: *I'm going to read a category list of items and you'll need to move to the corner which best describes you. Though you may not move every time, you must pick a corner 1, 2, 3, or 4 — no standing in the middle.*

I'll give a little time after each round/category for you to meet and get to know other ECLs that you have found new common ground with. Then I will read another list of items of a different category, where you will need to pick a new corner.

Example: First up, let's see what your favorite type of dessert is: corner 1) pie, 2) ice cream, 3) cookies, 4) fruit

Choose another list and go through as many as you wish or as time allows. **Best practice:** start with an easier/not as in–depth categories (food is universal!). Add a quick follow–up question for the groups to get to know each other if there is time.

Category List Examples:

- **Superpower of Choice**: fly, super strength, invisibility, read minds
- **Siblings**: only child, 1 sibling, 2 siblings, 3 or more siblings
- **Favorite alternative school subject:** drama, art, physical education/ sports, computer science
- **Social Media of Choice**: Facebook, Instagram, Snapchat, Other
- **Dreaded household chore**: clean the bathroom, take out the trash, sweep the floors, laundry
- **Family**: only speaks English, speaks both English and another language at home, speaks only another language at home, speaks 3 languages (Follow–up question, what languages?)
- **Sports team would you go see play?** Warriors, Raiders, 49ers, San Jose Sharks
- **Music Genre Choice at a party**: Hip Hop, Pop, R&B, EDM (Electronic Dance Music)

2. Step Up, Step Back

- **Time Needed:** 10 minutes
- **Group size:** 6–20 people
- **Materials needed**: Statements to read.

INSTRUCTIONS:
Ask participants to stand and form a line in the middle of the room. When the facilitator reads the statement to the group, members will step forward or step back if they believe the statement is true to them. If the statement doesn't apply, participants will stand still. Give people time to think before they move.

Example statements:

- If you had breakfast today, step forward.
- If you like to cook, step forward
- If you like how you sing even if other people don't, step back.

3. Fax Machine (can also be used for small groups)

- **Time Needed:** 10 minutes
- **Group size:** About 6 to 10 people
- **Materials needed**: Piece of paper and pen/pencil for every player

INSTRUCTIONS:

1. First set up the game by sitting all players in a circle indoors. This game might be hard to play around a table because each player needs to keep their paper secret from their neighbors.
2. Hand out paper and writing utensils to all the players. Have everyone write his or her name in small print at the bottom right of the page.
3. Everyone starts by writing a sentence at the top of his or her paper. It can be something random, true, abstract, from a song lyric, or about someone in the room.
4. Once everyone has a sentence at the top of his or her paper, everyone passes their paper to the player to their right.
5. Then everyone illustrates the sentence given to them with a small picture right underneath the sentence
6. Once everyone has finished drawing their sentences, everyone folds the top part of the paper so it covers the first sentence, but not the picture. Then again, everyone passes their papers to the right.
7. Now everyone receives a paper with just a drawing visible, and everyone writes the sentence that presumably could have led to that picture.
8. Then everyone folds over their paper so only the last sentence is visible and passes the paper to the right.

4. Team Chant or Gesture

Especially good activity for ECL Orientation in Step 1

- **Time Needed:** 5–10 minutes
- **Group size:** 3–10 people
- **Materials needed**: Piece of paper to write chant down.

INSTRUCTIONS:

Split the larger group in equal groups. Give each group 5–10 minutes to create a chant and/or gesture to represent their group or organization. After time ends, have each group perform their chant or gesture.

Add-Ons: Challenge the one to two ECLs to re–enact the gestures of all the groups for a prize.

5. Snowball

- **Time Needed:** 10 minutes
- **Group size:** 6–10 people
- **Materials needed**: Piece of paper and pen/pencil for every player

INSTRUCTIONS:

Write fun fact about yourself. Roll up the paper into ball and throw in the middle. Once everyone is done, each person picks up a snowball from the middle, reads the fun fact, and mingles around to try to find that person. Once you find the person the fun fact is about, help your new friend find their person until the whole group has found their person. Once everyone is done (some help/clues may be needed), if there is time, the group can share the fun fact and their new friend with everyone.

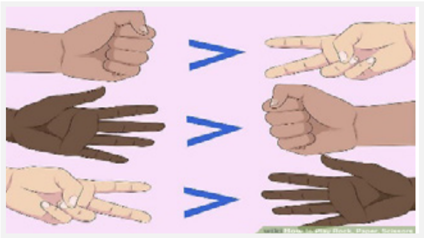
6. Balloon Trolley

- **Time Needed:** 15 minutes
- **Group Size:** 5–15 people
- **Materials needed:** One inflated balloon per person (minus one) and masking tape

INSTRUCTIONS:

Before you begin, place two strips of masking tape on the ground to signify start and finish lines, approximately 10–15 feet apart. Ask participants to line up shoulder–to–shoulder behind the starting line. Hand each of them a balloon except for the last person in the line. Instruct them that, in a moment, each of them will put the balloon between their shoulders (ex., two people standing next to each other will be holding the balloon on either side with their shoulders). They must hold the balloon there without touching it with their hands. They will need to walk to the finish line as a group. If any balloons touch the ground, the entire team must start again.

Debrief Questions:



- What happened during this activity?
- Did any one person emerge as a leader? If so, who was it and what did he/she do?
- How did you work together to accomplish your goal?
- How did individual actions impact the success of the team?
- How does this activity relate to the teamwork that happens when you have to work on a project in a group setting?

7. Team Rock, Paper, Scissors (RPS)

- **Time needed**: 10 minutes
- **Group Size:** 8–10 people
- **Materials Needed:** None

INSTRUCTIONS:

Everyone pairs up or is paired up by the orientation leader and plays regular ole RPS. The person who doesn't win their round is now a cheerleader and mobs behind the winner. The winners then take on a new opponent. At some point, the tournament will come down to only 2 people, with everyone else cheering!

8. Object Raps

- **Time needed**: 10–15 minutes
- **Group Size:** 4–6 people
- **Materials Needed:** Random objects (ex., eyeglasses, box, bottle, tape), instrumental music

INSTRUCTIONS:

In groups, members come up with a "rap" or poem about their object and perform it. Give 2 minutes to describe attributes about the object. 6 minutes to come up with lyrics. 2 minutes to perform Everyone in the group provides 1 line/lyric.

Ex: Object: Eyeglasses

Rap Song: "I See You"

- "(I see you!) Glasses with your cool funky frame,
- "(I see you!) Having clear vision is nothing lame
- "(I see you!) Coming in sizes from big to small
- "(I see you!) Glasses you help me see it ALL!

9. Superlatives

- **Time needed:** 10–20 minutes
- **Group size:** Four or more teams of 6–12 people are ideal
- **Materials needed:** None!

INSTRUCTIONS:
Ask everyone to stand up. The game facilitator reads out the category, and each team must quickly arrange themselves in proper ascending (or descending) order, lining up accordingly. When a team is in the proper order, have them sit down quickly. The first group to successfully complete each task wins the round. The facilitator then checks to make sure that the team is in fact in the correct order.

The goal of this game is for players to reorder themselves as quickly as possible.

Example categories:

- From shortest to longest — how many letters are in your first name.
- From farthest away to closest — birthplace.
- From least to most — how many brothers and sisters you have.
- Shortest to tallest — height.
- Beginning to end of yearvbirthdates.

10. True/False Run

- **Time Needed:** 15–20 minutes
- **Group size:** 10–20 people
- **Materials needed:** TRUE and FALSE signs large enough to be seen. True/ False Statements to read. Facilitator prepares statements — can be a mix of health and miscellaneous questions

INSTRUCTIONS:
Have the group stand in the middle of the room. One side is nominated “TRUE” and the other “FALSE”. The leader reads a statement (ex., “Tomatoes are a vegetable”. On **“Go!”** the members must move to whichever side they think is correct, true or false, and whoever reaches the correct wall first wins. Tally the winners on a board. Facilitator can have participants run, walk, skip, hop, tip–toe.

Alternatives:

- Can have everyone return to the middle for the next round (s)
- Those who choose the wrong answer are eliminated, and only the correct side continue to the next round.

Icebreakers
For Smaller Groups
PCs meetings or trainings

1. How are you feeling? Emojis on paper

- **Time Needed:** 3–5 minutes
- **Group size:** 5–10 people
- **Materials needed:** Emoji sheet, pen/pencil

INSTRUCTIONS:
This is more of a check–in and acknowledgment of your feelings. On the sheet given out, circle the emoji/s that portray how you are feeling. Be ready to explain why you feel that way.

2. Two Truths and One Lie

- **Time Needed:** 10–15 minutes
- **Group size:** 5–10 people
- **Materials needed:** None

INSTRUCTIONS:

When it is your turn, tell the group two things about yourself that are true and one thing that is untrue. Try not to tell both of your truths first and then the lie because that makes it easier to guess. Mix the order up each time it is your turn. Everyone in the group has an opportunity to try to guess which statement the lie was. Once everyone has guessed, the person will reveal what was true and what was false. If only one person was correct, that person can go next. Or, the person sitting closest to the last person can go next.

3. I Like To… (Move It Move It!)

- **Time Needed:** 10 minutes
- **Group size:** 6–10 people
- **Materials needed**: None

INSTRUCTIONS:

In this "get-to-know-you" game, have all participants gather in a circle.

- **One person is chosen to go first. That person will say:** "My name is _______ . My pronouns are _______ (ex. he/his, she/hers, they/theirs). I like to _______." When the person names their activity, they do an action that corresponds with the activity.
- **After the first person goes, the group responds:** "[Insert pronoun] likes to _______. [insert gesture]

- **The next person in the circle repeats the same phrase:** "My name is _______. My pronouns are _______ (he/his, she/hers, they/theirs). I like to _______." When the person names their activity, they do an action that corresponds with the activity.
- **The group responds the same:** "[Insert pronoun] likes to _______. [insert gesture]

Repeat for everyone in the circle.

Add–Ons:
To add on another level to this activity, you can have participants say the name and act out the gestures of the participants prior before they say their own. For example, there is a group of 4: Max, Natalie, Alicia, and Jeremy.

- Max goes first. "My name is Max, my pronouns are he/him/his, and I like to swim. **[swimming motion]"**
- Natalie is next. "His name is Max and he likes to swim. **[swimming motion]** My name is Natalie, my pronouns are she/her/hers, and I like to rock climb. **[climbing motion]**"
- At Alicia's turn, it goes: "His name is Max and he likes to swim **[swimming motion].** Her name is Natalie and she likes to rock climb. **[climbing motion].** My name is Alicia, my pronouns are they/them/theirs, and I like to paint. **[paint stroking motion]"**
- When it is Jeremy's turn: "His name is Max and he likes to swim **swimming motion].** Her name is Natalie and she likes to rock climb. **[climbing motion].** Their name is Alicia and they like to paint **[paint stroking motion].** My name is Jeremy, my pronouns are he/him/his, and I like to surf. **[surfing motion]"**

4. Would You Rather?

- **Time Needed:** 10–20 minutes
- **Group size:** 5–10 people
- **Materials needed:** Tape, Questions (or can be made up)

INSTRUCTIONS:

Place a line of tape down the center of the room. Ask the group to straddle the tape.

When asked "Would you rather...?" they jump/step to the left or right as indicated by the leader.

Example questions: Would you rather…

- Visit the doctor or the dentist?
- Eat broccoli or carrots?
- Watch TV or listen to music?
- Go without television or fast food for the rest of your life?
- See the future or change the past?
- Be three inches taller or three inches shorter?
- Wrestle a lion or fight a shark?

5. Health Taboo

- **Time Needed:** 10–20 minutes
- **Group size:** 6–10 people
- **Materials needed:** Taboo Cards, Timer, Buzzer

INSTRUCTIONS:

This is a health version of the classic game Taboo! Split the group into two teams. Clue cards have the clue word on the top of the card and the taboo words listed below the clue word. Clue-givers then start and keep the timer and must get their team to say the guess–word on the card without using one of the taboo words in one of their clues. If a taboo word is used, then Team B must sound the buzzer which penalizes Team A by causing the current guess card to go into the discard pile. Play is continued until time runs out. Each time a teammate successfully guesses a clue-word, a new card is placed upon the old and each card in this pile represents one point for Team A.

Lemon

- Fruit
- Yellow
- Tea
- Citrus

Cigarette

- Marlboro
- Camel
- Menthol
- Smoke

Rules:

1. Clue-givers may not use any taboo words, including abbreviations and any part of the taboo word.
2. Clue-givers may not use sound effects or use gestures to indicate the clue word.
3. Clue-givers may pass on any card at any time, but the card is then placed in the discard pile.
4. When time is called, the final card is removed from play.

Scoring:

- Every card stacked upon another in the card holder represents one point for Team A.
- Every card stacked in the discard pile represents one point for Team B.
- The final card in play when time runs out is worth no points for either team.
- At the end of each round points are tallied for each team, the winner is declared by the team with the most points.

6. Roll A Topic Ice Breaker

- **Time Needed:** 10–20 minutes
- **Group size:** 6–10 people
- **Materials needed:** Dice (or die), 1-pager explaining what information corresponds with what number

INSTRUCTIONS:

Get into a group(s) and roll the dice.

- If you roll a 1: Tell your favorite food (fruit/vegetable)
- If you roll a 2: Tell your favorite TV Show/ Movie
- If you roll a 3: Tell a place you'd like to travel
- If you roll a 4: Tell your favorite app
- If you roll a 5: Tell your favorite type of music
- If you roll a 6: Tell your favorite sport to watch and/or play. If not athletic, favorite activity to do.

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7. Deserted Island

- **Time Needed:** 10–20 minutes
- **Group size:** 6–10 people
- **Materials needed:** None

INSTRUCTIONS:

Have the facilitator ask the group: "*You've been exiled to a deserted island for a year. You are told you may take three things you want, apart from the essentials. What would you take and why?*"

8. React and Act

- **Time Needed:** 10–20 minutes
- **Group size:** 6–10 people
- **Materials needed:** Slips of paper with different events to act out (ex., hitting the jackpot)

INSTRUCTIONS:

Players randomly select a sheet of paper that has an occurrence on it (for example, winning a million dollars in the lottery) and they must react to the occurrence using animated expressions, gestures, and words. After 2 minutes, other players try to guess what happened that caused those reactions and actions.

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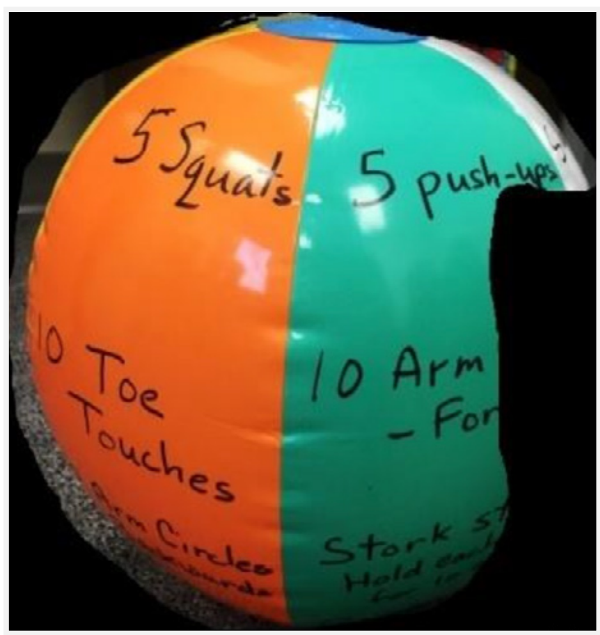
9. FitBall

(can also be used for a larger group)



- **Time Needed:** 10–20 minutes
- **Group size:** 6–10 people
- **Materials needed:** Beach ball (approx. 12”, permanent marker, list of Fitness Activities, “DJ” (Spotify/Pandora on phone)

INSTRUCTIONS:

Preparation

- Inflate beach ball.
- Using a permanent marker and the list of fitness activities below, write 3–4 fitness activities per color panel on the beach ball.

The Game

- Participants arrange themselves in a circle.
- DJ starts the music and participants will hand or toss the beach ball from one person to the next while the music is playing.
- DJ will randomly stop the music.
- The person left holding the FitBall when the music stops will pick the fitness activity that is closest to their right thumb.
- The group will complete the chosen fitness activity, but make sure everyone has the appropriate space before starting the activity.
- Return to your group circle and continue playing the game as time allows.

Fitness Activities (open to change)

Yellow Panel:

- 5 Squats
- 10 Toes Touches
- 10 Arm Circles (Backward)

Orange Panel:

- Run in Place for 10 counts
- 5 push-ups
- 10 Calf Raises

Green Panel :

- 5 jumping jacks
- 10 Squat Jumps
- Butterfly Sit (Hold for 10 counts)

White Panel:

- 10 High Knees
- 10 Lunges (Alternating Legs)
- 10 Shoulder Rolls (5 Forward, 5 Backward)

Red Panel:

- 10 Arm Circles (Forward)
- Side Arm Stretch (5 counts per arm)
- 5 Forward and Backward Jumps

Blue Panel:

- 5 Jumps to the Sky
- Hop on 1 Foot (5 Hops per foot)
- Upward Arm Stretch (Hold for 10 count

10. The Question Web

An especially good activity for the end of the cycle with the PCs

- **Time Needed:** 10–20 minutes
- **Group size:** 6–10 people
- **Materials needed:** A spool of string or yarn for this game

INSTRUCTIONS:

Have everyone stand in a circle and hold on to the end of the string and throw the yarn to one of the other people in the group.

Choose a question from 1–20 to answer.

If you had a time machine that would work only once, what point in the future or in history would you visit?	What was the best thing that happened to you this past week?
If you could go anywhere in the world, where would you go?	If your house was burning down, what three objects would you try and save?
If you could talk to any one person now living, who would it be and why?	If you HAD to give up one of your senses (hearing, seeing, feeling, smelling, tasting) which would it be and why?
Name one thing you really like about yourself.	If you were an animal, what would you be and why?

Name a gift you will never forget.	Who's your favorite cartoon character, and why?
What's your favorite thing to do in the summer?	What is the hardest thing you have ever done?
Does your name have a special meaning and or were you named after someone special?	What's the weirdest thing you've ever eaten?
If you are at a friend's or relative's house for dinner and you find a dead insect in your salad, what would you do?	What book, movie or video have you seen/read recently you would recommend? Why?

Holding the string they then throw it to another member of the group. Eventually, this creates a web. At the end of the game you could comment that we all played a part in creating this unique web and if one person was gone it would look different.

Developing Community Agreements

As public health professionals, we find ourselves involved in several teams and/or collaborative groups. Those groups come with varied attitudes, thought processes, and personalities. In order to foster a welcoming and constructive climate, mutual agreements on respect and conduct need to be established. We have provided 3 types of activities to develop community agreements for a training, your All CAM Monthly PC meetings, and other spaces. Activity 1 can be used when there is limited time to develop agreements during a training or meeting. Activity 2/3 is a more in-depth development of community agreements that stem from participants' values that can be used to establish agreements for a group that is meets regularly, such as your Project Coordinator cohort or their respective ECL teams.

30-Minute Option

Based on Values & Agreements Activity from www.healthiersf.org.

FACILITATOR SAYS: (or something similar in your own words)

> We are going to be spending a significant amount of time together throughout this meeting/training/ setting, therefore, it's critical that we create an environment amongst ourselves that will be supportive and safe to ensure each one of us is able to bring our best selves forward to work together as a team. Spending time exploring our values will assist us in forming this environment.

DIRECTIONS: PART 1, VALUES

1. Select one of the colored sheets of paper to represent the VALUES.
2. Hand out this sheet of paper and a colored marker to each person.
3. **SAY**: *Using this sheet of paper write down the name of one value would you like to offer into our staff community. (examples: Shared Responsibility or Trust best intentions, Inclusion of all voices)*

4. **Facilitate Circle Sharing:** invite each person to share what their value was and take 10 seconds to explain the significance of it for them. After each person shares, have them place their value in the middle of the room.

DIRECTIONS: PART 2, AGREEMENTS

1. Hand out the other piece of colored paper to each staff member
2. **SAY**: *Now using this sheet of paper write down one agreement that you are both committing to make to the community and requesting of the community*. (examples: Attentive listening, Attending all staff meetings, Ask for help when needed…etc.)
3. **Facilitate Circle Sharing**: invite each person to share what their agreement was and take 10 seconds to explain the significance of it for them. After each person shares, have them place their agreement in the middle of the room below the values.

DIRECTIONS: PART 3, ENSURING AGREEMENT
(VERY IMPORTANT PIECE. DO NOT SKIP)

Ask the following reflection questions:

1. Is there any value or agreement that has been offered that you would like some clarification on?
2. Are there any values or agreements that have been offered into our community space that you do not feel comfortable with? If so, please explain.
3. Some of us may have a different understanding and definition of some of the values and agreements that have been offered today. What are your thoughts about this and what do you propose we consider about it?
4. What if at some point down the road we do not feel like these values and agreements are being honored? What should we do?
5. As a team, can we all agree to follow these values and agreements to the best of our ability?

10-Minute Option

If you have limited time to develop these mutual agreements during your group training/meeting/setting, prepare a list of generally universal Community Agreements that apply to groups or teams (see example list below). Writing the agreements on a large poster paper/flip chart paper and with markers is easiest, but feel free to be creative! Be reminded that this list is **NOT** finite, so add others and modify so it best reflects your team culture. Oftentimes, the same set of agreements can be used for multiple meetings/trainings with the same group, so save your poster paper/list for next time if applicable. This activity works best if you need to allocate more time to other training activities but still want the team to create a tailored and productive environment.

At the beginning of your meeting/training, go through a list of pre-determined community agreements and ask:

1. If there are any agreements that want clarification or further description.
2. If there are agreements that really resonate with your group, and <u>underline</u>/**bold**/add symbols or colors to them.
3. If there are any other items that group members would like to add or take away.
4. Ask for agreement from the group by a simple thumbs up.

Example of Community Agreements

- **One Mic, One Voice:** Refrain from talking and making noise while someone else is speaking
- **Be Present:** Actively use your ears and mind to understand other viewpoints
- **Las Vegas:** What happens in this room, stays in this room.
- **No one knows everything:** Together we know a lot!

- **Be Curious:** Ask questions!
- **Self-Care:** Stretch, eat, drink, use restroom, as needed
- **Speak my language:** Use inclusive language that is accessible for people with varying knowledge, limit the use of acronyms or be sure to define acronyms if you use them
- **Are You Hearing or Listening?** Be conscious of how often you're listening to someone else, as opposed to waiting for your turn and formulating a response
- **Think Time:** Be conscious of time. Help stick to it or negotiate for more
- **Everyone participate, no one dominate**: If they feel they are speaking a lot, they should let others speak, and if they find themselves not talking, they should try to contribute some comments, ideas or suggestions.

Close the activity by reinforcing the mutual agreements that everyone has decided on with energy and positivity.

Other Examples of Community Agreements

- Treat everything you hear as an opportunity to learn and grow
- Listen from the "We" but speak from the "I"
- Seek common ground and understanding (not problems and conflict)
- Critique ideas, not people
- Bring your humor and have fun!
- Positive Energy!
- Be flexible

- Success depends on participation (share ideas, ask questions, draw others out)
- Ask “what’s possible?” Not “what’s wrong”? Keep asking
- Embrace multiple perspectives
- Celebrate difference
- Manage your devices

Partner Meeting Agenda

STEP: ______________________________

DATE: ______________________________

LOCATION: ______________________________

TIME: ______________________________

Time	Description	Facilitator
12:30–12:45 (15 mins)	**Welcome and check-in** • Always start the meeting with a quick check-in and Icebreaker • Overview of today's agenda • Draw or choose a feeling to describe how you feel about Step X • Everyone to share what feeling they chose and why • Step x Deliverable (due date x)	Staff A
12:45–2:10 (85 mins total) 1–2 (30 mins) 3–4 (30 mins) 5 (20 mins) 6 (5 mins)	**Step X Topic Group Think** 1. Break into two groups 2. In your groups, go around and share (10 mins per PC, TFP staff to chart responses on a flip chart for each org): • Progress/updates on xyz • What does success look like for my team after this step? (Examples: Publishing 1 letter to the editor, getting 50 students to participate survey, etc.) • What are some constraints for success? (Focus on xyz troubleshooting and xyz) **3. After each PC goes around and shares the above, then discuss #4 for each org (10 mins per PC)** 4. In your groups, strategize together to come up with ideas to overcome or address the constraints for success for each org 5. Reconvene as a whole group, stick flip charts on wall, and share back 6. Whole group to share any other ideas to support each other If possible, include a facilitated COLLABORATIVE LEARNING activity, such as a step-specific training, outside trainer, or peer support activity. Refer to the "Workshop Activities Types" guide for examples.	Staff B

2:10–2:30 (15 mins)	**Announcements and Reminders** **CAM Event X:** What is your availability? **Upcoming Event XYZ:** Date time location **Next CAM meeting:** Date time location **Deliverable Reminders:** • Due Date X: Step X Progress Report • Due Date Y: xxx Report, ECL Training & Tracking + 3 Evaluations, ECL Post-Surveys due End the meeting with Announcements, Event/Deliverable reminders. Often this time is used to gauge availability of PCs and ECLs for planning other upcoming events and trainings.	Staff C

ECL Pre-survey & Post-Survey

https://www.surveymonkey.com/r/ECLpreSurvey

https://www.surveymonkey.com/r/POSTCAMECLSurvey2023

Constant reminder for all PCs to conduct pre-/ post- evaluations of ECLs who are new or who have left the program.

One-On-One CAM Agenda Template

DATE: ____

LOCATION: ____

TIME: ____

Instructions: Community Action Model Project Coordinators are required to meet one-on-one with their designated Tobacco-Free Project Staff on a monthly basis for check-in and technical assistance. Project Coordinators are responsible for setting up or re-scheduling these meetings as well as either sending the agenda prior to meeting or bringing it to the meeting.

Agenda

1. Report back on Last Month's Achievements
   - Accomplishments based on last month's goals
   - Other successes related to the work
   - Challenges or barriers faced
2. Next Month's Goals
   - Specify next month's activities and timelines; roles of Project Coordinator and roles of ECLs
     - Be specific: who, what, where, when, how many
     - For example: meetings with stakeholders, especially city and county agencies; trainings with ECLs, community diagnosis tools development and data collection; and etc.
   - Tell us any technical assistance and support needs or questions
3. Any other updates

Example: TFP-BACR Meeting Agenda 5/26

MAY ACHIEVEMENTS

1. **Outreach**
   - ☐ Finished smoke-free packet, printing this week
   - ☐ Ordered smoke-free SWAG (pens, stickies, etc.)
   - ☐ Compiled list of 184 target multiunit properties

2. **Youth Engagement**
   - ☐ Interviewed and onboarded 2 new YPL members
   - ☐ Held 3 youth-led trainings for new YPL members

3. **Media**
   - ☐ Added original content to Facebook and Instagram

JUNE GOALS

1. **Surveys**
   - ☐ Will share draft survey with 4 community members for their thoughts
   - ☐ Preparing contacts to translate completed survey into Spanish

2. **Outreach**
   - ☐ Mail smoke-free packets to all low-income multiunit properties

   Youth Engagement
   - ☐ Continue holding trainings for youth (social justice, social media, etc.)
   - ☐ Develop youth-led smoke-free housing presentation with visuals
   - ☐ Hold end-of-grant debrief discussion and celebration at CHALK

3. Media
   - ☐ Add downloadable version of smoke-free outreach packet to website
   - ☐ Work with Stanford to expand smoke-free map data
   - ☐ Continue adding original social media content weekly

OTHER NOTES:

- Youth-led smoke-free presentation at Washburn Residence, Conard House July 18th
- Dates for key informant interview with Derek and/or Jessica
- End-of-grant report deadline

CAM Project Coordinator Training

Day 1 Example

What	Agenda Items	Time	Notes & Materials
Welcome/Intro	1. Welcome 2. Training Objectives & Agenda 3. Ice Breaker 4. Community Agreements	Hard Start: 9:15 9:15-10:00	Name Tags, Agendas, Sign-In Sheet Main Slide Deck
Public Health & Health Equity	1. Tree Diagram Group Activity 2. Define Public Health, Health Equity and Policy-System and Environment	10-10:30 10:30-11	Butcher Paper & Markers Health Equity Slide Deck,
Break		11-11:15	
Orientation to CAM Program	1. CAM Structure & Roles 2. CAM 101 Overview, emphasis on Step 1-3 3. Deliverable Timeline review 4. Q&A	11:15-11:30 11:30-12:30PM	CAM Slide Deck
Lunch	Lunch – Meet with your Lead Staff to Identify One-on-one meeting time, do an activity to get to know each other better	12:30-1:30	
Tobacco Free Coalition Presentation	Structure of Tobacco Free Coalition History & Accomplishments & Meetings	1:30-2:00	
Tobacco & Social Justice	Basic knowledge about tobacco issues locally, globally and tobacco industry tactics Kahoot Game Quiz!	2:00-3:00	Tobacco & Social Justice slide deck Kahoot Game
Wrap Up	Share Take-Aways Evaluations	3:00-3:30	Evaluations

CAM Project Coordinator Training

Day 2 Example

What	Agenda Items	Time	Materials
Welcome	1. Welcome 2. Training Objectives & Agenda	9-9:30AM Start: 9:15	Sign-In Agenda
CAM Partner Networking Activity	Networking Activity (aka Speed Dating) so that groups learn about each other and agencies	9:30-9:45	
CAM Topic Teach Ins	• BreatheCA- Menthol & Flavors (9:45-10:00) • BACR –Smoke Free Housing (10-10:15) • Q&A (10:15-10:25)	9:45-10:30	
Stretch Break		10:30-10:45	
Group Site	• Introduce Group Site (10 minutes) • Get everyone on group site- Create a profile & Post something (15 minutes)	10:45-11:20	
Previous PC Panel	2-3 previous PC share their best practices & experience on recruiting and training ECLs + Q&A	11:20-12	
Lunch	Lunch Break	12:00-12:30	
ECL Recruitment and Engagemen	CYAN provides best practices for youth/ TAY recruitment & engagement	12:30-1:15	
ECL Recruitment and Engagement	Pairs work on recruitment/ engagement strategies timeline and planning & share back out to group for discussion	1:15-2:15	
Wrap Up	Next Steps Wrap Up + Evaluations	2:15-3PM	Evaluations

Project Coordinator Onboard Checklist

Instructions: Please use this check list as tool for on-boarding whenever there your organization hires a new CAM Project Coordinator. Past CAM partners have found it helpful to have a strong and smooth hand off between Project Coordinators to successfully accomplish their organization's CAM workplan and deliverables.

For Out-going Project Coordinator & Director

- ☐ Tobacco-Free Project know of transition and timeline
- ☐ Meet with ECL team to discuss changes and timeline to support their transition
- ☐ Organize and file all program documentations (ex. progress reports, curriculum, documents, ECL documents and tracking, past one-on-one agendas, budgets etc.)
  - ☐ Develop instructions on the organization of program documentation
  - ☐ Upload documents to Groupsite folder for your organization
- ☐ Develop instructions and descriptions about ECL program: trainings, engagement strategies, ECL team structure and agreements, ECL stipend processing, etc.
- ☐ Develop a contact list of key partners and stakeholders for the project
- ☐ Recommend at least 1 transition meeting with new and outgoing Project Coordinator

For Incoming Project Coordinator & CAM Partner Director

- ☐ Set up an on-boarding meeting with the Tobacco-Free Project to develop a transition plan
- ☐ Internal organization-specific on-boarding (ex. human resources, time reporting, supervision, team meetings, etc.)

- [ ] Set up initial introduction meeting with ECLs and identify ways to build trust and rapport
- [ ] Discuss Community Action Model Program budget and work plan
- [ ] Share program documents; where it is, what is there, how they are used
- [ ] Share current CAM objectives and deliverables
- [ ] Discuss ECL team goals, curriculum, engagement, and stipends
- [ ] Program Coordinator watches the CAM webinar: https://tinyurl.com/2017CAMwebinar
- [ ] Program Coordinator reviews case studies on SFtobaccofree.org

CAM Workshop Development Guide

Adapted from School of Unity and Liberation (SOUL)

Identify Your Training Parameters

- Audience: Project Coordinators, Emerging Community Leaders, Age Group, Cultural/Identity
- Topic
- Time/ Length
- Location/ Space
- Type of Training

Isolate the Learning Objective

- What specific ontent are you prioritizing?
- What skills or core concept do you want the participants to walk away with?

Plan for Your Audience

- Where are they at in terms of their analysis, knowledge and skill around the topic?
- Why is this workshop relevant to this group? How can you make it relevant?

Develop a Preliminary Outline

- Timing
- Learning Objective
- Facilitator
- Don't forget: introductions/ icebreakers, evaluation, wrap up

Identify Best Way to Engage and Contribute to Learning

- Workshop Activity/ Exercise Type
- Don't forget: Principles of Popular Education

Write out the Facilitator's Guide

- Directions and notes for facilitator(s) & materials needed

Review Draft Workshop

Try It Out, and Get Feedback

CAM Showcase and Celebrations

After Steps 3 and 4, the Funding Agency hosts a celebration to recognize the work and honor the accomplishments that the Project Coordinators and Emerging Community Leaders have invested into CAM. These celebrations are an opportunity to share the work and findings from each CAM project with community members, researchers, family and friends, agency staff, and other Funding Agencies. Begin thinking about and planning for these celebrations at least a month to two months in advance to allow yourself an adequate amount of time to prepare. This guide provides a general overview of some considerations to keep in mind when planning for a CAM celebration.

Planning

Begin at least one to two months before event

Purpose/objective of event: Establishing a purpose or objective for the event will provide you with a clear direction on how planning should continue. Typically our Step 3 and Step 4 celebrations have been an opportunity to bring people together and honor PCs and ECLs while giving them an opportunity to showcase their work. Depending on what makes sense for your grantees, you may decide to host a celebration for another purpose (kicking off a new step, etc.).

Staff/planning committee: Designate 1–2 staff members from your team to project manage and plan for the event. Having staff organize a planning committee made up of a few PCs is also an opportunity to gather input on how to make the event fun and engaging for ECLs. Using online tools such as Asana may be helpful to collaborate and assign tasks to other team members as well. If there is a local coalition that works in partnership with the Funding Agency, consider having the coalition host the celebration.

Budget: Work with leadership to establish a budget for the celebration in terms of how much to allocate for reserving a space/venue, food, giveaway and raffle prizes, music, decorations, etc.

Event Date: Since some CAM project have ECLs who are in school and balancing multiple responsibilities, coordinate with PCs to find out what date would work best for ECLs to have the celebration. It may also be helpful to know what day of the week and times that PCs meet with their ECLs and decide on a date from there. Generally, we have had celebrations on weekday evenings from 5–7pm.

Event Location: Finding the right space is an important aspect to hosting a successful celebration. We like to keep in mind places that are easily accessible by transportation, locations that host other community-oriented events, and venues that are large and open enough to accommodate the amount of guests we expect at the event.

Event Name: Come up with a fun, inclusive, and memorable event name. We have engaged PCs and ECLs to share and contribute their ideas for an event name, through a contest and incentive raffle prize that goes to someone randomly for contributing. Ultimately, the Funding Agency should make the final call on what the event will be called. Previously, we have named our celebrations “CAM Showcase” and “CAM JAM!”

Guest Speaker: If you are planning on inviting a guest speaker for the event, initiate contact with them to coordinate with them.

Certificates: As a way to honor PCs and ECLs, we have created certificates for them that are distributed during the celebration event. Plan ahead to create and design these if you wish to provide them. We have used websites that provide templates such as canva.com to create and design the certificates.

Presentation format: Depending on the purpose of your celebration, think about how you want the event and the showcasing of the work to flow. Be sure to let your grantees know at least a month in advance what the expectations for the presentation will be. Some presentation formats we have implemented:

- PowerPoint presentations
- Round robin: This style involves grouping up guests, structuring and timing presentations so that everyone has the opportunity to visit or see X amount of presentations.
- Health fair/science fair format: Setting up tables all around the event space and having projects create a tri fold presentation board with their work to display.

Giveaway items and prizes: We have given giveaway items for every attendee at our celebrations. If you are ordering in bulk, plan ahead to figure out when placing the order makes sense. We have done items such as sunglasses, water bottles, and popsockets with our Coalition's branding and website printed on them. Keep in mind the environmental impact and practicality of the items.

Activities: To add other elements of fun and engagement, come up with activities that guests can participate in during the event. Be sure to consider activities that won't be too distracting to the other parts of the event. Some ideas for activities:

- Scavenger hunt
- Button making
- Bingo
- Crafting table
- Photo booth
- Performances like spoken word pieces, music, etc.

Food: Think about what kind of food you would like to serve during the event and initiate contact with vendors to set up orders.

Decorations: If you plan to decorate the space for the event, be sure to order/purchase/create those in advance.

Talking points: If you are inviting someone to speak at the event, such as a Co-chair of your coalition or the Director of your department — develop some talking points to help them prepare.

Evaluation: To collect feedback and comments from guests, develop a short evaluation that can be distributed and collected easily. Use these evaluations to improve celebration events in the future.

Implementing

At least 3 weeks before event

RSVP: Set up some method for guests to RSVP and share the event with others. Previously, we have used Eventbrite to gather and count RSVPs. Remember to set a final date for guests to RSVP.

Develop materials:

- Invitations/event flyer: These can be distributed to PCs and ECLs so they can share them with their friends and family. Additionally, they can also be disseminated online or through other meetings.
- Program agenda
- Certificates for PCs and ECLs
- Name tags
- Signage for tables
- Banner or sign for event

Technology: Once you have reserved a space for the event, take some time to figure out what technology you will need for the celebration. If the location that you are hosting the event at provides the technology that you will need, it may be helpful still to check out the space a week or so before the event and make sure that everything works.

- Microphone
- Projector
- Speakers
- Music

Team roles for day of event: Assign, delegate, and communicate tasks to your team. It may be helpful to create some kind of grid so that everyone is aware of their role.

- Set up tasks: tables, food, decorations, technology, etc.
- Photographer
- MC
- Sign in table/greeter
- Distribute/collect evaluations

Evaluating

After event

Team and PC Debrief: After the event, meet with your team and debrief the event. It may be helpful to document any plusses/deltas and other things to consider for future planning. It can also be helpful to hear if PCs and ECLs had any feedback.

IV. San Francisco CAM Strategies & Challenges

Introduction

In building community leadership and creating Policy-System-Environmental change, Funding Agencies, Project Coordinators (PCs) and Emerging Community Leaders (ECLs) have inevitably faced and overcame challenges resulting in effective strategies. Each Community Action Model (CAM) project and CAM cycle is unique, giving rise to new strategies and challenges that we hope others who implement the CAM Program in their communities can learn from. Through an extensive review of past CAM project's reports, key informant interviews and case studies, we have summarized strategies and challenges for each step, and included direct examples when possible. Given that we only recently instituted more reflective mid and end of year reporting, there may only be a small number of lessons learned for some steps. We have also listed selected strategies that our internal Tobacco-Free Project (TFP) CAM team have identified for each step, which are also listed at the end of each of the "Step by Step" guides. As with any iterative process, this list of strategies and challenges will continue to grow and develop over the years. We hope that this can at least give you some insight as you guide and build capacity of Community-Based Organizations (CBOs) to implement the CAM Steps.

Step 1: Recruit & Train Participants

Emerging Community Leaders & Project Coordinators

STRATEGIES

Capacity Building of Project Coordinators

- During orientations, defining roles and expectations for PCs, ECLs, and Funding Agency staff helps set the relational framework for the CAM project.

Funding Agency staff should plan to provide support and leadership in staff transitions so that the work done is not wholly dependent on one person holding it together.

- Community capacity-building requires a focused investment over multiple years, and should provide a cohort experience among funded organizations coupled with individual support.
- Create a culture of quality improvement and co-learning with PCs through asking for regular feedback and integrating suggestions.
- Though Funding Agency may provide core workshops for PCs to use, PCs are responsible for tailoring the workshop to fit the skill level and context of their ECLs.

Recruitment of Emerging Community Leaders

- Use multiple strategies to recruit ECLs such as fliering, tabling, and word of mouth at local community events, schools, community colleges, faith-based organizations and at other community partners.
- As an opportunity for career development for ECLs, create an application and interview process, which clearly describes time commitment and the stipend.

"We offer career coaches who are constantly guiding youth; they develop a Career Action Plan that leads to a permanent job, or they are placed in an internship that leads to a permanent job. Many of these resources are free and at times they are incentivized so more than often youth are compensated for completing a mark in their plans."

Maintaining Emerging Community Leaders

- Project Coordinators (PCs) can keep ECLs engaged through the 5-Steps of the CAM by reviewing previous steps, guiding them in their current Step, and showing how it fits with the entire process.
- Community-Based Organizations (CBOs) can provide other on-site supportive services for ECLs to support their engagement and participation in the CAM project, as well as meet other social, emotional and developmental needs, such as career coaching, case management, interpretation and mental health services.

Training and Capacity Building of Emerging Community Leaders

- Project Coordinators (PCs) customize skill building and support for each ECL to effectively promote and foster their leadership, through identifying their needs and meeting them where they are.
- Project Coordinators (PCs) invite ECLs to take ownership and direction of the skills they want to build by having them particpate in choosing topics, planning meetings, and holding each other accountable to achieving their goals.

> "One strategy that really goes far when planning and doing activities is to give ECLs full control on the material/skills they want to develop and PC as well as other staff to provide the right guidance and tools to encourage development."

> "As each of my ECLs are on different levels of their professional skills, I learned that it was important to be able to provide them the space to create time to refine whatever skills they would like to practice rather than to assume they are all on the same level of professional development."

- Provide opportunities for ECLs to continue learning about tobacco prevention, so they can approach their projects with knowledge that will strengthen their capacity and self-esteem.
- Project Coordinators (PCs) can foster a space of learning among ECLs, so that they are learning and offering new skills and experiences among one another, rather than just the PC leading the process.

Challenges

- Some health topics, such as tobacco-use, feel irrelevant to PCs and ECLs considering more pressing social justice issues.
- Funding Agencies and CBOs need to work together to adjust the project's timelines and expectations based on unexpected challenges, such as ECL attrition and competing priorities, organizational issues, change in staff, and political will, which are outside of their control.
- Project Coordinators (PCs) that are leading ECLs from different cultural backgrounds and ages may find it challenging to support and train due to these differences.

"Working with youth and adult ECL's can be challenging for multiple reasons ex. adults were not always computer literate, language barriers, and cultural barriers. In some cultures, it's not appropriate for young people to tell older people what to do."

Step 2: Define, Design & Do Community Diagnosis

STRATEGIES

Funding Agency Support for Project Coordinators (PCs)

- Provide a list of existing resources and data sources before Step 2 to support CAM PCs.
- Given that research skills may be new for both PCs and the ECLs, provide intensive technical assistance and support to CAM projects in Step 2.
- Training of PCs and ECLs in research methods is most effective through role-play and practice.

"ECLs worked together to ensure that all members were knowledgeable about tobacco prevention topics through Literature Reviews (on smoke free housing, drifting smoke, etc.). Then I dispersed research questions to ECL teams for them to do their own research on tobacco topics, yielding more knowledgeable ECLs. "

- During All CAM Partner meetings, encourage PCs to share their research progress and support one another.
- Community Action Model (CAM) projects conducting surveys can utilize online survey software such as Survey Monkey & Google Forms.

CAM Project Strategies

- Project Coordinators (PCs) should encourage ECL ownership of all parts of the research process as well as gaining insight and feedback from experts.
- Project Coordinators (PCs) should utilize provided trainings and develop their own, and use role-play and practice, to support their ECLs in conducting primary data collection, such as key informant interviews, surveys and focus groups.

Challenges

- CAM PCs and ECLs can be overwhelmed when juggling multiple research activities to complete their team's data collection activities by set deadlines.
- Be aware of and account for the time it takes to recruit participants for the primary research phase.
- Spend additional time training and supporting ECLs in conducting research activities, which may be new and challenging for some.

"ECLs identified populations they wanted to survey. After identifying the need to work with primarily low-income populations, they created the questions on their own, and analyzed the questions together. ECLs were also able to translate questions that were in English to Spanish. Afterward I reviewed the questions with my Director, and was able to provide ECLs with suggestions."

"Although the survey training was extremely useful, some ECLs felt that they needed more time to internalize the content learned through the training. We had to carve out more time during workshops to revisit the survey training."

Step 3: Analyze & Disseminate Community Diagnosis

STRATEGIES

Funding Agency Support for Project Coordinators (PCs)

- Develop a Guidebook to help PCs have a stronger sense of expectations of Step 3 timelines.
- Assess training and technical assistance needs from PCs on data analysis skills.
- Time the data analysis trainings so that it isn't too far in advance while teams are still immersed in conducting their data collection.
- Share examples of compelling messages and visualization from previous CAM groups as models and to increase confidence of ECL teams.
- Provide resources and technical assistance to each group in identifying, messaging, and visualizing their key findings.
- Involve CAM PCs and ECLs in the planning of the CAM Showcase

> "After the interviews, each young person wrote a summary of what they heard/understood and/or compiled their notes into a shared Google doc in a shared folder for that specific interviewee."

> "A workshop that was less successful is when I had them do the full analysis of our survey data. While I had worked with them the week before and modeled how to do quantitative analysis for Question 1 of our survey, I thought they had a good understanding of how to write strong statistics. I think it was more challenging for them to work independently to come up with research findings, especially interpreting the data from the graphs."

CAM Project Strategies

- Develop a way for each ECL to interpret and understand their findings, especially right after a focus group discussion, interview or photovoice data collection, to contribute to the findings.

- Ensuring a role for each team member and practicing the CAM Showcase and community presentations helps hone ECL presentation skills, which are often a key area of growth for them.
- Tap into the creative design skills of ECLs in developing PowerPoints, presentations and infographics.

Challenges

- Expect ECLs to have various levels of experience when it comes to data analysis. This skill may be new to some ECLs, while others may be equipped with the knowledge and skills to analyze/interpret data.
- Narrowing down findings can be challenging, especially if there are numerous findings that ECLs recognize to be important and valid through their project.

"One activity we conducted with our ECLs that was challenging focused on narrowing down our top 3 survey findings. The voting split across eight key findings, and some of the findings that were most startling to me (PC) had a low number of votes. We implementing additional rounds of voting and narrowing of the findings. At the end of each voting session, ECLs had the opportunity to ask questions and share their rationale for voting the way they did. Because ECLs were able to share their rationale, they collaboratively decided on three key findings."

Step 4: Selection and Implement Action

STRATEGIES

Funding Agency Support for Project Coordinators (PCs)

- Review previous CAM Actions and community-led campaigns to motivate CAM PCs and ECL teams, as well as identifying best practice strategies.
- Use the collective wisdom of PCs to help generate some Action ideas for each team if they are having trouble coming up with one.
- Clearly differentiate between an Action and Demonstration Project, and other tactic activities.
- Midwest Academy Strategy Chart (MASC) is a useful tool in guiding CAM project team to developing a strategy to reach one target decision-maker while the CAM Action Plan tool helps flesh out their plans for each tactic.
- Recognize that political and social landscape directly influences the direction and

"Clearly assess policy makers and their level of support for the issues. Be sure you know where the policymaker stands before beginning a negotiating process. Have clear and up to date assessments on the legislators and their level of support for the issues; use that assessment in deciding which legislator to work with most closely as a sponsor."

"Incorporate Social Media presence. Know proponents on social media, and opponents on social media."

"The power of collaboration. Given the many other organizations in the Tenderloin that were trying to do similar work, the youth realized it made no sense to try to do everything themselves when they can collaborate with the Tenderloin Neighborhood Development Corporation that has already organized thousands of residents that are thinking the same thing."

"Since tobacco is not a priority for most of the organizations contacted, an ongoing challenge was getting groups to respond to phone calls and emails."

feasibility of their CAM project's Demonstration Project and Action, and support PCs in identifying back up plans or "wins."

- Encourage PCs to initiate stakeholder or community presentations early on in Step 4 to help set up team well for gaining endorsements and planning for a Demonstration Project.
- Encourage CAM projects to develop a social media presence at the beginning of Step 4 or utilizing their agency's social media handle to increase and reach their audience.

"No matter how much advance planning is done there can still be a considerable amount of waiting time because of circumstances outside the control of the project."

CAM Project Strategies

- Tap into the knowledge and support of key partner organizations, such as Community-Based Organizations/non-profits/faith-based organizations, who may be doing the same work to build power for your CAM Action.
- Gain endorsements, resolutions or support from other decision-making bodies, such as the Youth Commission, that have influence over your primary decision-maker.
- To identify the right decision-maker, complete background research on all potential decision-makers and identify any connections your CAM team may have with them.
- Prepare for plans to shift at any given time throughout the implementation phase. Always have multiple plans of action in place, in case there are critical parts that change due to unforeseen circumstances.

"There will be opposition: Know who might oppose ordinances/policies and why; know what messages the opposition may use to argue against the ordinance/policy"

"The youth experienced how difficult it can be trying to work with a government agency. These agencies are like pillars, it felt like we were taking on giants."

- Set realistic expectations for ECLs about how long it may take to create a Policy-System-Environmental (PSE) level change.

Challenges

- Gathering endorsements take time and may require building new relationships with community partners through one-on-one meetings or attending community events.
- Understand that government agencies may not be able to support certain policies that ECL teams develop. Be willing to compromise. Be comfortable with developing multiple project options.
- Expect and understand the opposition in order to effectively strategize methods of neutralization; additionally, prepare to address the opposition.
- Calendaring meetings between ECLs, PCs, and potential stakeholders and decision-makers will arise, which can slow down momentum and present barriers.

Step 5: Maintain and Enforce Action

STRATEGIES

- Identify and engage with stakeholders who may implement and enforce the Action to discuss the enforcement process for an Action in Step 4.
- Emerging Community Leaders can keep decision-makers and/or agencies that will implement or enforce the action accountable through their own monitoring activities.
- Focus on both goals of the CAM: the Action and capacity building of Emerging Community Leaders.

"It is no small task however to sustain an issue when funding has stopped, and the students involved with the project have graduated, unless a student club or advocacy group is willing to integrate the issue into their own agenda."

- Celebrate the success of the CAM Projects, the Project Coordinators and the Emerging Community Leaders — for completing all steps of the CAM!
- Funding Agencies can consider funding CBOs beyond the 2 Year CAM cycle to continue the work, especially if there is significant momentum in achieving and Action or community-led enforcement activities.

Challenges

- Emerging Community Leader and CBO involvement and continued efforts in addressing the issue, even when an Action is in place, is often dependent on funding.

Step 1

Recruit and train participants, name the issue, and choose Area of Focus.

Terms

- **Funding Agency:** Agency that funds and coordinates trainings and convenings for the Community Action Model program's Community-Based Organizations.
- **Project Coordinators (PCs):** Dedicated staff person from the Community-Based Organization that recruits, trains and supports the Emerging Community Leader team in completing the five steps of the CAM.
- **Emerging Community Leaders (ECLs):** community leaders who are willing and available to engage and be trained to complete the 5 steps of the CAM
- **Workshops:** Weekly meetings and/or trainings for the ECLs convened, facilitated and coordinated by their CBO's Project Coordinator
- **Train the Trainer:** Funder provides training/curriculum to the Project Coordinators to guide them in training their ECLs
- **Popular Education:** Method and philosophy of education that holds oppressed people at the center of the learning process. It's an educational pedagogy in which participants and educators are co-learners who critically reflect on issues of equity in their community and take action to change them.
- **Scaffolding:** training and education methods to provide temporary support for CAM participants, PCs and ECLs, to reach the next level of proficiency in their leadership skills

Step 1 Overview

Step One of the CAM has three parts: (A) Recruit and Train Participants or Emerging Community Leaders (ECLs); (B) Name the Issue; & (C) Choose Area of Focus.

1) Recruit & Train Emerging Community Leaders (ECLs)

Recruiting and training ECLs is **the foundational step of the Community Action Model and critical to the goal of building capacity of community leaders.** CAM Project Coordinators spend the bulk of the first two months recruiting their team of 6–8 ECLs who represent the community that is most impacted by their topic area. ECLs tend to be people of color, young people, low-income, LGBTQ and others. The recruited ECL team often have common identities of a neighborhood, age, school, ethnicity, and other identities that they represent. Project Coordinators are responsible for maintaining their team of 6–8 ECLs throughout the whole CAM cycle, which may mean doing additional recruitment when individuals leave for various reasons.

Maintaining a team of community leaders goes beyond the initial recruitment and requires building trust and relationships among team members. Project Coordinators can set a strong sense of identity and support on their team by:

- Creating a Team Name
- Creating team t-shirts and other swag to represent team identity
- Co-developing Group Agreements based on team values
- Discussing and finalizing stipend agreements regarding amount, changes to amount, and disbursement process
- Identifying roles on teams per CAM step
- Discussing the team process on dealing with conflict and resolution
- Going on regular team bonding events and outings
- Integrating workshops based on ECLs' interests
- Celebrating completion of each CAM Step

Given that Emerging Community Leaders bring their whole selves and lived experiences to the CAM project, Project Coordinators often provide additional support in other life areas, such as academia (tutoring, college recommendations, etc.), familial trauma or conflict, legal or system-related advocacy or processes, and "drama" among team members. We encourage Project Coordinators to utilize support and resources offered by their Community-Based Organizations and other networks to support their ECL teams. Supporting ECLs in these other areas of their life recognizes their humanity and the external forces that influence their capacity to engage in CAM workshops and activities.

ECL Recruitment Strategies

- Flier and table at local community events, schools, community colleges, faith based organizations and at other community partners
- Recruit through word of mouth through community members already in CBO's programs
- Clearly describe the time commitment and stipend for participating in the CAM project in the application and flier
- Create an application and interview process as an opportunity for career development and selecting ECLs

In the beginning of Step 1, the Funding Agency provides orientation trainings to Project Coordinators, then to their recruited Emerging Community Leaders to set the framework and foundation of the Community Action Model. Project Coordinators develop curriculum and workshops for their ECLs so that they can implement all steps of the Community Action Model. In the beginning of Step 1, workshops are focused on their chosen topic, naming the issue, and choosing the Area of Focus. These initial trainings set a foundation of understanding for PCs and ECLs alike on public health, health equity, Policy-System-Environmental change, and community-driven public health work. Read more about CAM training philosophy and style on "Training is not just in Step 1" (page 372).

2) Name the Issue

"No discussion of improving people's health and well-being can be made without looking at health and social inequities in the context of the systems and policies that create them. No solution to dismantle these inequities can be made without the full involvement and leadership of those communities impacted most by the social and economic injustice that these promote."

- Whereas training of ECLs takes place throughout the 2 years of the CAM process, a focused training of ECLs exists during Step 1 that digs deep into the root causes of health inequities. This is called, "Naming the Issue." As such, Emerging Community Leaders and their Project Coordinator name the issue that their team wants to address to improve the health of their community through a Policy-System-Environmental change solution.
- In the case of most grant funded projects, the issue or topic of the CAM project is selected by the organizations as part of the grant writing process before the recruitment of their ECLs. For example, the San Francisco Tobacco-Free Project's Request for Proposal for the Community Action Model includes a list of topic areas in which a Community-Based Organization can apply for their proposed CAM project. The menu of topic areas is generated by the local tobacco control coalition using a priority selection process. Other Funding Agencies could use existing coalitions, community forums, and other ways to invite community to generate priority areas in chronic disease prevention with emphasis on health equity. In a more authentic, community-led process, ECLs can initiate a series of town halls with community members to identify a list of community health issues of concern and then prioritize them.
- A secondary purpose of "Naming the Issue" is raising the critical consciousness of the Emerging Community Leaders. The ECLs take a deeper look into the root causes, or the social determinants of health, that result into their issue. An activity, like the Tree Diagram, can help ECLs see the larger systemic, environmental, and political factors that impact health

rather than individual health behaviors. Naming deeper systemic issues, such as access to job opportunities, healthy foods, safe and affordable housing, discrimination, racism, transportation, and residential segregation, help connect their health topic to other relevant community issues of importance.

3) Choose the Area of Focus

Even though the topic area of the CAM project may have been decided prior to the engagement of the Emerging Community Leadership, ECLs should take the lead in creating and deciding on their "Area of Focus." The Area of Focus becomes what is most meaningful for the ECL team and where they will direct their energy for the rest of the steps of the Community Action Model. With the guidance of the Project Coordinators, ECL teams should dedicate workshop time in building foundational knowledge about their topic area and discussing what aspect of the topic would be most meaningful and impactful for their community. ECL teams should also assess if there are existing Policy-System-Environmental change solutions and a decision-maker to create that change. Their final Area of Focus should also provide parameters for the next step: Define, Design and Do Community Diagnosis.

A strong Area of Focus should include:

- **Who is the community**. Description of the population or community that is impacted by the issue.
- **Why this matters.** Explanation of why the issue is important to the ECL team and how addressing this issue will improve the health of community. This can also include an explanation of how it is a social justice or health equity issue.
- **What is the potential solution.** A description of a possible Policy-System-Environmental change solution that the team want assess the public support for.

General Public Health	Topic Area	Area of Focus
Can be defined by funder or by community concern if funding is more flexible.	List of concrete topic areas provided by funder, coalition, or through community prioritization process.	Emerging Community Leaders provide more context to the Topic Area based on what is more meaningful and impactful for their community
Example: Tobacco Accessibility	High concentration of stores that sell tobacco in the city	Stores should not be able to sell or advertise tobacco products near schools. Tobacco industry targets youth and young people through marketing, cheap and low-cost product options at these stores. Exposure to marketing and products creates a norm of tobacco use in community that can initiate use among youth. Neighborhoods with a high concentration of stores that sell tobacco product also tend to be low-income communities, and communities of color.
Example: Healthy Eating	Healthy Food Access & Options	In comparison to other communities, ours in the southeast corner of San Francisco cannot easily buy healthy foods, such as fresh fruits and vegetables, in stores in their neighborhood. If there are options, they are expensive or the quality is poor. Eating healthy is foundational to health and well-being. A community food supply chain should be funded and established through the Food Security Task Force. Community and school gardens can supply healthy foods to corner stores, neighborhood farm stands, community-supported agriculture, and other venues at an affordable price. Foods should feature our food culture and community preferences.
Example: Physical Activity	Safe Play Spaces	The Park and Rec commission should equitably distribute funding for improvements, reassess all parks to determine improvement needs and develop a new improvement schedule. Many of the parks in low-income areas of the city have not been updated and improved for the last 10 years, leaving no place for young people to play and be active. Concerns about safety should also be addressed through a community-led process. These are the same communities that have higher rates of diabetes and obesity among their young people.

Training is not just in Step 1

Training of all participants of CAM happens throughout all five steps. CAM uses a two-tiered training model in which CAM Project Coordinator and the Funding Agency staff have a role in providing trainings and building the capacity of ECLs. The Funding Agency acts as a **train-the-trainer** by developing, facilitating, and modeling workshops for Project Coordinators that they can use with in their workshops with their ECL teams. At each step, the Funding Agency also provides step specific trainings for the ECL teams as a way for all CAM partner ECL teams to engage, train and build relationships as a cohort.

Trainings that we recommend for each of the steps are provided in each step's training sections. Workshops that have been created by the SF Department of Public Health Tobacco-Free Project and affiliated outside trainers are denoted by an asterisk and included in this toolkit.

- Convene monthly All CAM Project Coordinator (PC) Meetings
- Provide and train PCs on core workshops and other key skills
- One-on-one monthly technical assistance

- Cater and facilitate CAM core workshops to ECLs
- Develop and implement curriculum plan
- Develop and facilitate additional workshops for ECL teams
- Ensure ECLs attend trainings coordinated by Funding Agency

- Attend and participate in weekly workshops
- Attend and participate in trainings coordinated by Funding Agency
- Learn and apply leadership skills and knowledge to implement all CAM steps

Core Knowledge & Skills for CAM ECLs

Through the CAM, core knowledge areas and skills are being developed among both the Project Coordinators and their Emerging Community Leaders. The ECL pre-survey assesses individual's baseline skills and knowledge and offers Project Coordinators and the Funding Agency an understanding of the knowledge and skill gap each team may have. The ECL post-survey then assesses the change in knowledge due to their participation in the program.

Funding guidelines and community-identified concerns determine the topic area focus of the knowledge area trainings. For example, if you are funded in tobacco control then trainings addressing the social, behavioral, health equity and policy aspects of tobacco should be planned. If your ECLs identify food justice or housing just as their issue you would plan similar broad range trainings. Some knowledge area trainings are always provided such as public health, steps to pass policy and community organizing tactics.

Knowledge Areas	Skill Areas
• Public Health Concepts: social determinants of health, health equity and prevention • Societal factors that influence health • Challenges people face in their community to be healthy **Steps to pass policy in their jurisdiction:** • Community organizing tactics • Sample tobacco control areas • Health harms of tobacco • Tobacco industry targeting • Second-hand and third-hand smoke impacts **Sample Food Justice Area:** • Unequal access to healthy foods impact health	**Step 1:** • Facilitate meeting among peers • Plan a meeting for a group project **Step 2:** • Develop a research plan • Conduct research on existing reports and literature online or at the library • Interview a community leader, expert or other key informant • Develop and conduct a focus group discussion of 8-10 people on a topic • Develop and conduct a survey in your neighborhood or community **Step 3:** • Analyze and interpret data you gathered from survey • Analyze and interpret data gathered from focus group or key informant interview • Create graphics or tables to represent research findings **Step 4:** • Organize community towards a social action or cause • Organize and plan a community event • Developing tailored messages to different stakeholders • Present and educate community members on health issue • Present and educate decision-makers about a community issue • Develop fliers, fact sheet and other materials to educate peers • Provide public comment or present to local elected decision-making body • Use social media to educate and activate others to join a cause • Write letter to editor or opinion letter about an issue • Speak to news reporter or media about an issue you care about

Training Best Practices

Funding Agency focuses on capacity building of Project Coordinators, who then train their Emerging Community Leaders.

The CAM isn't just about building the skills and leadership of Emerging Community Leaders, but also the Project Coordinators. The Funding Agency puts most of its energy into the capacity building of Project Coordinators, who then support the skill development and leadership of their ECL team members. Project Coordinators have a variety of backgrounds and experience in their role and may need varied levels of support. The one-on-one technical assistance and support meetings provide individualized support that is needed.

The Project Coordinators training schedule is developed to support their completion of the CAM deliverables with opportunities for flexibility and additions. Training schedules are regularly reviewed by Project Coordinators so that they can provide any additional insight or ideas to what they may need to build their skills. Trainings are facilitated by both the Funding Agency as well as outside trainers that can bring expertise and another perspective in the area.

Project Coordinators experience the core workshops for themselves first so that they gain the key concepts and skills. During these trainings, we provide space for Project Coordinators to reflect and provide feedback on how they may tailor the workshop activities and format for their team members to meet their age, skill-levels, language capabilities and learning styles. During these discussions, Project Coordinators can generate and glean ideas from one another on how to deliver and adapt the workshop for their ECL teams.

In addition to training Project Coordinators on CAM-related steps, skills and deliverables, Funding Agencies should also consider providing trainings to build their capacity in leading and supporting an ECL team, developing and facilitating workshops, project management, and other key skills to enhance their work in CAM.

Workshops and trainings are designed with popular education principles and scaffolding techniques rather than traditional banking or didactic learning.

Popular education principles are core to the way we design and facilitate CAM workshops. Workshops are developed to invite participants to be co-educators by contributing their own experience, generate meaning, and be part of the decision-making process.

Popular Education in Practice (adapted from School of Unity & Liberation)

Encourage Dialogue

- 30:70 ratio of facilitator and participant talking
- Pair-shares
- Brainstorms and discussion with peers through both large group and breakout activities

Check It Out
Examples of workshop activities and icebreakers in the "Collaborative Learning Section"

Make it Relevant

- Use language and examples that are accessible to participants. For example, when talking about survey research inviting participants to think about the surveys they have taken at school, work or online. When talking about organizing and campaign tactics, provide a case study or example of current, well-known, and relevant campaigns.
- Connect tobacco control or other health topics to other related social justice issues in their community, such as housing, food access, and environmental concerns.
- Share how knowledge, skills, and experiences built into these workshops are part of their professional development and can be applied in school, careers and community work.
- On the other hand, highlight how their existing skills and experiences are relevant and are assets in the CAM work. For example, their knowledge of social media, blogging, vlogging and technology can be leveraged in

their campaign or their connections to other community organizations can help with recruitment for their focus group discussions.

Offer Context

- Provide additional information and knowledge about the topic in an accessible way to ensure that discussions and decision-making are grounded in context and best practices. Facilitators can use documentaries, fact sheets, existing policy and strategies, neighborhood walks, and other ways to provide key information.

In developing workshops, Funding Agency staff and Project Coordinators can include **scaffolding techniques** described below to provide temporary support for their team to reach the next level of proficiency in their leadership skills.

Scaffolding Technique	Definition	Example: ECLs identify qualities of a good survey tool and survey questions.
Tap into Prior Knowledge	Connect the activity or workshop to an example in real life, and ask for participant's expert knowledge and ideas	PC asks ECL team to share about previous surveys they have taken (ex. at school, customer satisfaction, online etc.) to gather their thoughts on what makes for a good experience for a survey participant. ECLs write what they consider are the most important qualities onto separate post-it notes. PC gathers post-it notes and groups them on the board, writing overarching ideas to each grouping.
Modeling	Show Emerging Community Leaders what is expected in the activity or final project by providing examples, case studies, videos, and role plays.	PC brings in examples of surveys used in past projects for ECL team to look at as examples. PC uses one example to talk through what makes for a good survey design and survey questions. Then, asks the group to share their thoughts about another example. PC writes down on piece of chart paper these qualities for survey design and survey questions.

	Use pair-shares or small group discussions that encourage participants to share their opinions and inputs about the topic	ECL team breaks into small groups to look at an example of a “bad survey” to discuss what could be changed to make the survey better in relation to the design of the survey and the questions asked. ECL small groups share back what they decided. PC writes down on piece of chart paper these qualities for survey design and survey questions. PC places stars next to repeating input.
Visual Aide	Show photos, graphics and videos that help students learn about the topic or complete the activity. Or use chart paper to help organize team’s process and product.	PC facilitates conversation with team about good vs. “bad” survey questions. As the team provides their input, PC writes it on a chart paper to compare the qualities. PC then uses this as a reference point for when the team develops their own survey tool.

Encourage and design opportunities for ECL leadership in workshops to further leadership development.

Workshops and trainings are also spaces for ECLs to strengthen their leadership skills. Project Coordinators are encouraged to phase-in opportunities for their team members to take ownership of workshop time. Examples of leadership opportunities include taking notes, charting responses, leading icebreakers, and assisting in facilitation. As the project progresses, ECLs have also helped set agendas for the workshops or even taken over the whole workshop in its planning to execution.

The Lead Emerging Community Leader (Lead ECL) role was developed in the 2017-19 iteration of the Community Action Model cycle to institute a best practice from one of the CAM partners, Youth Leadership Institute. They developed an additional leadership position for an Emerging Community Leader to step into as a workforce development strategy. Often times these Lead ECLs become Project Coordinators, then program directors, and other lead staff in the Community-Based Organization or community at large.

Integrate regular training evaluations to assess the training effectiveness and get participant input on changes.

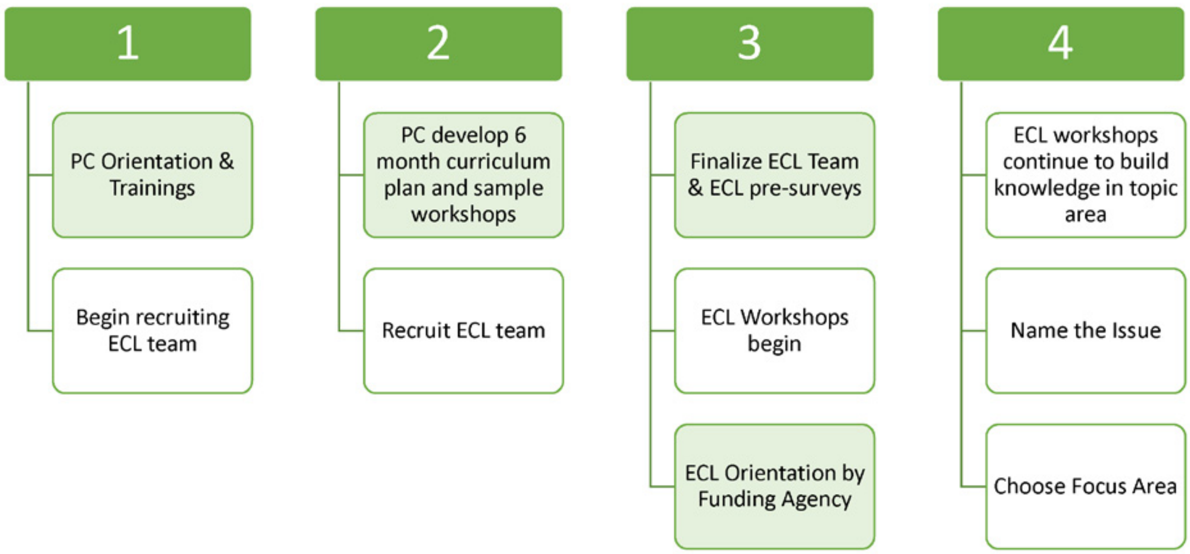
Trainings and workshops are only effective if participants can walk away with key learnings and new skills. Regularly gathering their input about how the training went for them and any changes that could improve learning can help improve future trainings. Examples of training evaluations include:

- Plus-Deltas or Kisses and Misses
- Bulls Eye
- Participant Survey

Check It Out
Samples of these evaluation tools in Setting Up the CAM

Time Frame in Months for a 2-Year Cycle

Month 1–4 out of 24



Deliverables

- **3-6 Month Curriculum Plan & Sample Workshop:** Project Coordinators provide a draft weekly workshop plan as well as an sample workshop. This allows for the Funding Agency to provide feedback on the timing of workshop activities to ensure alignment with deliverables. Their sample workshop can provide insight on their curriculum development, workshop structure, and team building. Project Coordinators can also share these during partner meetings to attain peer feedback from other Project Coordinators

- **Emerging Community Leader Pre-Survey:** Newly recruited Emerging Community Leaders are required to fill out a survey to assess baseline knowledge and skills. A summary report is shared with their Project Coordinators to identify areas of strengths and opportunities for training and skill building on their team.

Trainings by Funding Agency

For Project Coordinators	For Emerging Community Leaders
1. 2-Day Project Coordinator Orientation 2. Icebreakers* • Tree Diagram Activity* • Defining Public Health, Health Equity & Policy-System-Environmental Change • Tobacco as a Social Justice Issue* • Introduction to the Community Action Model* • Alumni Project Coordinators Panel • Youth and Transitional Age Youth Recruitment & Engagement Best Practices 3. Principals of Popular Education 4. Workshop Facilitation 5. Workshop Development* 6. Project Management	**Half Day Emerging Community Leaders Orientation** • Icebreakers • Tree Diagram Activity* • Tobacco as a Social Justice Issue* • Brief Community Action Model overview

**denotes training curriculum included in this toolkit*

Recommended Trainings for ECLs conducted by Project Coordinators

- CAM Overview*
- Tobacco as a Social Justice Issue*
- Social Determinants of Health-Tree Diagram*
- Visioning for their healthy community*
- Developing team agreements & structure
- Team building activities

- Examples of previous CAM projects
- Neighborhood walking tours
- Workshops on foundational understanding of their CAM's Topic Area

Step 1 Strategies

1. During the orientations, **define roles and expectations for Project Coordinators, Emerging Community Leaders, and Funding Agency staff to set the relational framework for the CAM project.** Project Coordinators have the most difficult role, often caught between communicating expectations, deliverables and trainings between Funding Agency and their Emerging Community Leader team. Furthermore, Project Coordinators must strike a balance in providing workshop space that nurtures and develops leadership of their ECL team while ensuring the progress of the project. PCs may be tempted to take on more of an executive decision-maker role rather than being a facilitator, trainer, coordinator and co-learner. Or they may lean towards the other spectrum of leaving it up to their team to make all of the decisions without providing guidance, context, and training. Funding Agency staff need to reinforce and support Project Coordinators in this difficult dance.
2. **Foster building a trusting relationship with Project Coordinators through one-on-one meetings.** We hope that Project Coordinators see us, the Funding Agency, as allies and a resource rather than being caught on deliverables and results. To do so we encourage PCs to bring their authentic self in one-on-one meetings genuinely asking about how they are doing beyond their CAM project, practicing active listening before providing technical assistance, asking questions to help them generate their own responses, and always being available outside of one-on-one meetings to respond to questions. We also adjust deliverable deadlines within reason based on challenges that the team may be facing, especially if challenges, such as ECL attrition and competing

priorities, organizational issues, change in staff, and political will, are outside of their control.

3. **Practice a culture of quality improvement and co-learning with Project Coordinators through asking for regular feedback and integrating suggestions**. Throughout all CAM Steps, Funding Agency staff can minimize power dynamics and practice humility by asking for feedback from Project Coordinators in regards to workshop activities, trainings, deliverables and timelines. This can be done informally during monthly meetings and one-on-ones, or formally through progress report calls and interviews by external evaluators. Funding Agencies can also report back to the CAM Project Coordinator cohort any findings and collectively discuss ways to address issues.
4. **Develop a norm of collaboration and peer learning among the cohort of Project Coordinators.** During monthly partner meetings, Funding Agency should integrate activities such as pair-shares and small group activities to build a sense of co-learning among Project Coordinators. For example, Funding Agency can ask Project Coordinators to bring in a challenge that they are experiencing in their ECL team workshops or their project so that their peers can help provide insight or coaching to address it. In addition, Funding Agency can encourage Project Coordinators to work together on developing and tailoring workshops, sharing resources and ideas, observing each others' workshops, attending one another's events, and even meeting up one-on-one. Specifically encouraging returning Project Coordinators to act as mentors to support new Project Coordinators can also enhance the collaborative learning environment.
5. **Provide training and resources to set a strong foundation for Project Coordinators in the orientation process.** Often Project Coordinators come with different skill sets and backgrounds, such as an educator, youth development or public health practice, and may need further skill

building. Upon assessment of Project Coordinators assets and areas of growth, investing in trainings in areas like facilitating workshops, developing curriculum, youth development framework, leadership development, foundational understanding of health topic areas, and other core areas can help set the Project Coordinator up for success. This is also an opportunity to leverage the existing resources and assets of Project Coordinators. Project Coordinators can provide peer workshops and trainings in these areas as well.

6. **Though the Funding Agency may provide core workshops for Project Coordinators to use, Project Coordinators are responsible for tailoring the workshop to fit the skill level and context of their Emerging Community Leaders.** During trainings, Funding Agency can provide space and time for Project Coordinators to brainstorm or work together to identify how they would tailor the curriculum to their groups. Providing a training on how to tailor workshops can also help show the need for and build skills of Project Coordinators to do so.
7. **Some health topics, such as tobacco-use, feel irrelevant to Project Coordinators and Emerging Community Leaders in light of more pressing social justice issues.** Funding Agencies and Project Coordinators need to make their CAM project topics and skills relevant to the lives of Emerging Community Leaders to continue engagement and momentum on the project. Connecting their topic area to other community issues like housing rights, immigration, and racial equity can bolster their engagement on the project especially when it may feel arduous during Step 2 data collection or developing a campaign plan in Step 4. Similarly, Funding Agencies and Project Coordinators can highlight the transferable leadership, research and public health skills and knowledge that are developed.

Step 1 Training Samples

This step is all about training participants, naming an issue, and choosing an Area of Focus for the project. The trainings in Step 1 provide an introduction to the knowledge that participants will build and develop through CAM.

The sample training agendas included in this section include the following:

1. **Project Coordinator Training, Day One and Day Two**
   - This two day training was developed with the objective of providing a glimpse of public health and health equity concepts, as well as an introduction to tobacco issues locally and globally for Project Coordinators. The training also provides an opportunity for Project Coordinators to learn about previous CAM projects and strategize with each other.
2. **Tree Diagram Activity**
   - An activity that you can do with Project Coordinators to use critical thinking skills to identify the root causes or social determinants of health.

Remember to use these samples as a guide to create your own trainings for your CAM participants. Tailor and customize!

Example: Project Coordinator Training, Day One

What	Agenda Items	Time	Notes & Materials
Welcome/Intro	1. Welcome 2. Training Objectives & Agenda 3. Ice Breaker 4. Community Agreements	Hard Start: 9:15 9:15–10:00	Name Tags, Agendas, Sign-In Sheet Main Slide Deck
Public Health & Health Equity	• Tree Diagram Group Activity • Define Public Health, Health Equity and Policy-System and Environment	10–10:30 10:30–11	Butcher Paper & Markers Health Equity Slide Deck
Break		11–11:15	
Orientation to CAM Program	1. CAM Structure & Roles 2. CAM 101 Overview, emphasis on Step 1–3 3. Deliverable Timeline review 4. Q&A	11:15–11:30 11:30–12:30PM	CAM Slide Deck
Lunch	Lunch: Meet with your Lead Staff to Identify one-on-one meeting time, do an activity to get to know each other better	12:30–1:30	
Tobacco-Free Coalition Presentation	• Structure of Tobacco-Free Coalition • History & Accomplishments & Meetings	1:30–2:00	
Tobacco & Social Justice	• Basic knowledge about tobacco issues locally, globally and tobacco industry tactics • Kahoot Game Quiz!	2:00–3:00	Tobacco & Social Justice slide deck Kahoot Game
Wrap Up	• Share Take-Aways • Evaluations	3:00–3:30	Evaluations

Example: Project Coordinator Training, Day Two

What	Agenda Items	Time	
Welcome	• Welcome • Training Objectives & Agenda	9–9:30AM Start: 9:15	Sign-In Agenda
CAM Partner Networking Activity	• Networking Activity (aka Speed Dating) so that groups learn about each other and agencies	9:30–9:45	
CAM Topic Teach Ins	• BreatheCA, Menthol & Flavors (9:45–10:00) • BACR, Smoke Free Housing (10–10:15) • Q&A (10:15–10:25)	9:45–10:30	
Stretch Break		10:30–10:45	
Group Site	• Introduce Group Site (10 minutes) • Get everyone on group site- Create a profile & Post something (15 minutes)	10:45–11:20	
Previous PC Panel	2–3 previous PC share their best practices & experience on recruiting and training ECLs + Q&A	11:20–12	
Lunch	Lunch Break	12:00–12:30	
ECL Recruitment and Engagement	CYAN provides best practices for youth / TAY recruitment & engagement	12:30–1:15	
ECL Recruitment and Engagement	Pairs work on recruitment / engagement strategies timeline and planning & share back out to group for discussion	1:15–2:15	
Wrap Up	• Next Steps • Wrap Up + Evaluations	2:15–3PM	Evaluations

Tree Diagram Activity

Source: Human Impact Partners

The Tree Diagram Activity raises critical consciousness of Community Action Model participants by inviting them to dig deeper and identify the root causes of health outcomes that impact their community. The analogy of a tree helps participants see that we often only see what is above the surface-heart disease, cancer, or depression — and do not know or think about the roots from which these health outcome stem, or social determinants of health. It's important to emphasize in this workshop that if community members, public health professionals and decision-makers do not work together address the root causes, then the poor health outcomes will continue to flourish.

Learning Objective:

- To identify root causes, or social determinants, of health outcome or health issues impacted by community members or the health topic
- To discuss the importance of addressing root causes of health to effectively improve the health of communities

Time: 30–45 Minutes

Facilitator Guide

Leaves: What are some health issues/ disease of concern in your community?

Branches: What are some behaviors that contribute to this health issue/disease?

Root: What are the underlying causes that contribute to the behavior?

1. **Leaf:** Choose one Health Issue or Disease that your team cares about
2. **Branches:** Write down behaviors that lead to that disease outcome
3. **Roots:** Write down underlying or root causes that influences that behavior

Step 2
Define, Design, & Do Community Diagnosis

Terms:

- **Participatory Action Research:** Community members take the lead in designing, conducting and analyzing research on their community issue, leading towards action to create sustainable change for the community. Researchers or other experts provide skill building training, technical assistance and support in the process, but community members should ultimately be the drivers and owners of the research, findings and the solutions.
- **Problem Statement**: CAM teams describe in their own words the health issue they've chosen to work on and why it matters to them
- **Community Diagnosis**: Conducting primary and secondary research to explore and understand the problem/issue.
- **Primary Research:** Conducting research that gathers first-hand data from others about the issue.
- **Secondary Research:** Examining and analyzing research and data that has already been compiled, reported and published by others about the issue.

Step 2 Overview

Step Two is considered the participatory action research phase of the Community Action Model. Research shouldn't be left to the scientists and academics alone where community members are often times just the subject of the research. Instead, during Step 2, Emerging Community Leaders (ECLs) take charge of defining the problem, designing the research methods and tools, conducting the research themselves, and then analyzing the resulting data and narrative to identify solutions in partnership with their community members. While traditional "needs assessments" focus on problems, needs, and weaknesses, the CAM step 2 includes research on the capacities, local organizations, strengths and resiliency evident in all communities.

After CAM teams gain general knowledge about their health issue and zero in on their Area of Focus, they put on their research hats to explore more deeply about how their issue impacts their community to highlight the need for a Policy-System-Environmental change solution.

Throughout this process, ECLs develop critical consciousness about the health inequities that stem from systematic injustices. For example, ECL teams have observed the higher density of tobacco stores in low-income neighborhoods in comparison to high-income neighborhoods, leading them to ask "WHY" is there higher access to tobacco products that result in a social norm of use in their community.

Define Diagnosis

To define their diagnosis, ECL teams develop a problem statement that narrows in on the specific issue their team wants to address and the community it impacts as well as the rationale. Rooting ECL teams in their statement for "Why this issue matters" can help encourage their progression on this phase, especially when survey collection or interviews become arduous or discouraging. Teams are encouraged to consider various Policy-System-Environmental change solutions on which that they gather input and assess community support.

Skills Learned

- Developing Research Questions
- Developing a Research plan
- Developing and administering a survey
- Developing and facilitating a focus group discussion
- Developing and conducting an interview
- Research existing policies

- Other research methods
- Recruiting participants for research
- Using online survey platforms (Google Forms, Survey Monkey, etc.)
- Project and time management
- Team work

Once the teams define their diagnosis, they develop a list of research questions to guide its design. Research questions should be open-ended, help the ECL team to understand how the issue impacts their community, shows a need for change, and demonstrates community support for a solution. Often times, ECLs equate research questions to questions in a survey or a focus group guide. To address this, it can be helpful to call these “overarching questions” or “big questions.”

Design Diagnosis

To answer their “overarching questions”, the ECL teams develop a two-phased community diagnosis plan with both primary and secondary research methods. The secondary research phase should be done first as it builds knowledge and context to help ECL teams design the primary research phase.

For the primary research phase, ECL teams, with TA and support the Funding Agency staff and other trainers, design 2–3 primary research tools including required key informant interviews to be conducted with 4–6 stakeholders who were identified in their secondary research phase. Other data collection tools may include surveys, focus group guides, key informant interview guides, observations, and photovoice prompts. Teams are encouraged to incorporate best practices, such as pre-testing and translating their tools; utilizing recruitment strategies to ensure that the sample represents their community; and practicing and role-playing data collection scripts with their team members.

Using the Step 2 Toolkit and trainings, teams develop a timeline of activities to complete their research plan.

Conduct Diagnosis

During this data collection phase of Step 2, ECL teams split into small groups that conduct different diagnosis activities. For example, ECL team members can group into the “Survey Team”, “Photovoice team” or the “PSE Research Team” and take ownership of the development and the data collection for that specific method. Small groups can enlist other team members to help conduct their activities as well as hold each other accountable in completing their activities through report back or visual ways to mark progress.

Project Coordinators provide guidance, help trouble shoot challenges, and ensure that the smaller groups report back to the larger team, delegate roles to other team members, and complete their diagnosis activity. Depending on the capacity and availability of the ECLs, Project Coordinators may have to initiate relationships with other community partners or help set up key informant interviews, survey collection or focus group discussions. Often, Project Coordinators use high-tech or even low-tech project management systems with their team to ensure completion of this phase. For example, Project Coordinators may have a large poster calendar that displays tasks and goals for each team. At every team meeting, groups report back and check off their progress or troubleshoot challenges with one another.

In this part of Step 2, the Funding Agency staff provide technical assistance and support to the Project Coordinators and ECLs to ensure the success of their CAM projects’ data collection. Examples of technical assistance and support include:

- Providing templates for organizing the data collected
- Directing towards reputable online and existing resources
- Connecting to known stakeholders and decision-makers for interviews
- Suggesting community partners and locations for primary data collection

Values in Step 2: Community Diagnosis

Adapted from Community Diagnosis, Foundations of Community Health Workers

- Begins with an issue of concern to community members with the aim of combining knowledge and action for social change to improve health and eliminate health inequalities (WK Kellog Foundation, 2001)
- Educates and raises consciousness of all participants (Tsark, 2011)
- Values knowledge generated from life experiences of community members (WK Kellog Foundation)
- Prioritizes issues of gender, race, class and culture in the design and analysis (Minkler, 2003)
- Actively involves the language and cultural values of community members in the design and implementation (Arble and Moberg, 2006)
- Participation of community members (ECLs) in the development of research question, design, data collection, analysis and dissemination (Tsark, 2001)

Finally, ECL's can get discouraged when data collection is unfruitful or slow due to circumstances they cannot control. For example, a team might spend a month collecting 50 surveys when their goal is 200 or only 4 people show up to the first focus group discussion. CAM Project Coordinators and Funding Agency staff need to strike a balance between gathering quality data and enough sample size while helping the teams continue momentum and progress towards the next step of the CAM. Trainings, field trips and discussions about other related health equity or social justice issues have been helpful.

Time Frame in Months for a 2-Year Cycle

Month 5–10 out of 24

Deliverables:

- **Step 2: Define & Design a Community Diagnosis - Secondary Research -** CAM teams develop and design their research plan, specifically for secondary research. The deliverable provides templates for a secondary research plan which includes defining their Area of Focus, research questions, and plan to conduct a review of their Area of Focus, existing Policy-System-Environmental practices and key stakeholders. The research plan also asks the team to delineate the role of the PC and the ECLs. Tables of how to summarize their findings is included.
- **Step 2: Define & Design a Community Diagnosis - Primary Research Plan -** CAM teams develop and design their research plan, specifically for primary research. The deliverable provides templates for a primary research plan for 2–3 primary research methods, requiring key informant interviews. The research plan also asks the team to delineate the role of the PC and the ECLs.
- **Step 2: Progress Report -** A simple progress report that describes accomplishments, challenges and technical assistance/support needs. We found that it can be helpful for Project Coordinators to report on their successes

and challenges of Step 2 thus far as a way to assess areas of technical assistance and support needed across all projects.

- **Secondary Research Findings Report -** Technically, this report falls in Step 3, Analysis of Community Diagnosis; however, through feedback from CBOs we have decided to separate out reporting for secondary and primary research to reduce the reporting burden in Step 3. PCs expressed that having to report on research done awhile ago can be difficult and attaching so many documents can be taxing. The findings report also allows the CAM Projects to summarize their key findings in the first phase of the Community Diagnosis that can help inform their primary research phase.

Trainings by Funding/Training Agency

For Project Coordinators:	For Emerging Community Leaders
1. Step 2 Training: Participatory Action Research Training 2. Survey Development Training* 3. Developing and Conducting Key Informant Interviews*	1. ECL Step 2 Training: Research Questions & Diagnosis Methods 101*

*denotes training curriculum or agenda examples included in this toolkit

Recommended Trainings for ECLS conducted by Project Coordinators

- Developing Research Questions*
- Developing and Conducting Focus Group Discussions*
- Developing and Conducting Key Informant Interviews*
- Developing and Conducting Surveys*
- Using Survey Monkey/Google Forms*
- Overview of Research Methods
- Online/library literature research
- Researching and Reading local policies

- Identifying key stakeholders or community partners related to your issue
- Community Mapping

Other Resources:

CAM Step 2 Toolkit for Research Methods*

Step 2 Strategies:

1. **Provide a list of existing resources and data sources before Step 2 to support CAM Project Coordinators.** During orientation and beginning of Step 1, we recommend that Funding Agencies provide existing data and research about a CAM project's topic to Project Coordinators so that they begin to have a foundational understanding of their topic and able to orient their CAM team. Without the initial support on the topic, Project Coordinators may have trouble guiding their team in this secondary research phase.
2. **Provide intensive technical assistance and support to CAM projects in Step 2 given that research skills may be new for both the Project Coordinator and the Emerging Community Leaders.** The Funding Agency can develop a toolkit companion of workshops, protocols and examples of the various research activities to support the Project Coordinators. The toolkit should be coupled with in-person trainings and technical assistance, especially for primary research activities, so that CAM teams can have hands on experience. In addition, the Agency can contract out trainings and technical assistance to an evaluation or research consultant agency to share their subject matter expertise provided that the consultant values and has experience in community-led or participatory research as well as training on research best practices and standards. The outside research agency can set up one-on-one support hours for each CAM project through office hours or initiation of each CAM project. Funding Agency staff should also provide technical

assistance and review of plans and tools, such as their surveys, before CAM projects move forward in data collection.

3. **Training of Project Coordinators and Emerging Community Leaders in research methods is most effective through role-play and practice.** Project Coordinators and ECLs can practice administering their actual survey or facilitating their focus groups in a safe learning environment before going out in the field. Teams are encouraged to pre-test their data collection tools with peers and colleagues to practice and refine their tools.
4. **Emerging Community Leaders may deem research as an expertise of scientists and academics and disengage in the research process in Step 2.** Funding Agency and Project Coordinators can help re-engage ECL members by reframing Step 2 as a way for community members to "take back" and "own" their research priorities and data rather than simply being the subject of researchers. Project Coordinators can also highlight the valuable skills that ECL's will learn and apply to their school, career, and other social justice organizing work. Finding ways to make research and the data collection process relevant, meaningful and fun will benefit the ECL teams' progress and success in this step.
5. **CAM projects conducting surveys can utilize online survey software such as Survey Monkey & Google Forms.** Instead of using pen to paper surveys, online survey platforms or software are available to simplify the process. These platforms make developing a survey easy and will generate summary data reports. One thing to note is that the CAM CBO may need access to iPads or ask ECLs to use their mobile devices to collect the data. Funding Agencies could also lend out device for data collection to CBOs and their ECLs.
6. **Project Coordinators can be overwhelmed when juggling multiple research activities to complete their team's data collection activities by set deadlines.** The Funding Agency can provide project management

support by creating Gantt charts, calendaring tools, or online project management platforms to support the Project Coordinator as well as providing a project management training in Step 1. Splitting up Step 2 into two phases: secondary and primary research can also simplify the research process. In addition, it is helpful to set hard deadlines for data collection to ensure momentum towards Step 3: Analyze and Disseminate Results of Community Diagnosis. This avoids situations where CAM project teams feel demoralized for not reaching their data collection goals, such as the number of surveys collected, focus groups, and interviews.

7. **Project Coordinators need to be aware of and account for the time it takes to recruit participants for the primary research phase.** For example, when developing their community diagnosis plan, ECL teams may allot only 2 weeks to reach out to Community-Based Organizations, schools, and others to partner with for the recruitment of focus group, survey, or photovoice participants. This may not be enough time. PCs' can help the team successfully meet the timeline by encouraging teams to build in more time for scheduling, begin reaching out to potential partners before finalizing their tools, and/or tapping into existing community partnerships.
8. **During All CAM Partner meetings, encourage PCs to share their research progress and support one another.** Hearing updates on the progress that their peers and their CAM teams are accomplishing keeps Project Coordinators accountable and helps them identify strategies to address challenges they are facing. PCs often will share strategies on recruitment, such as how to connect with community organizations to recruit participants for surveys, how to identify roles for their ECL members or how to motivate their team.

Step 2 Training Samples

This step is about conducting community diagnosis so it is critical that PCs and ECLs are equipped with and knowledgeable of the skills needed to succeed in their data collection and research. Depending on the research methods that CAM projects select and the areas of support that are needed, some opportunities for training include developing surveys, using SurveyMonkey or Google Forms, and conducting focus groups and key informant interviews.

The sample training agendas included in this section include the following:

1. **Bright Research Group's Developing and Conducting Key Informant Interviews**
   A training for PCs on developing a protocol for conducting, recruiting participants, and facilitating focus groups.
2. **Bright Research Group's ECL Community Diagnosis Training**
   A training designed to get ECLs excited about research and data and inform them on how to ask research questions to frame their community diagnosis.
3. **Bright Research Group's Survey Development Training**
   A train-the-trainer style training for PCs to identify good survey design and develop tools to coach ECLs through survey development.
4. **Online Research & Existing PSE Review Guide**
   A resource for PCs to guide ECL teams to complete secondary research, including literature reviews and existing PSE reviews.
5. **Step 2 Guidebook**
   A resource for PCs to design a community diagnosis plan and conduct research methods.

Design & Do Community Diagnosis Guide Book

Contents

How to use this Guide Book

We developed this guide to assist Project Coordinators in guiding their CAM Emerging Community Leaders in completing Step 2: Define, Design & Do Community Diagnosis. We hope that this is particularly useful for Project Coordinators who have little or no experience in conducting community-led research. The guidebook includes the following:

- **How to Design a Community Diagnosis Plan with Your ECLs**: Steps & Workshop Ideas
- **How to Conduct Research Methods**: Toolkits for Surveys, Interviews, Focus Group Discussion, Online Research & Photo Voice

What is Community Diagnosis?

Community diagnosis is a process to **find the causes** of a community's issue of concern and to **discover the Community-Based solution** to address the issue.

In the CAM, Community Diagnosis has 3 steps:

1. Design a Community Diagnosis Plan (CAM Step 2)
2. Do Community Diagnosis (CAM Step 2)
3. Analyze and Report on Diagnosis (CAM Step 3)

How to Design a Community Diagnosis Plan

In Step 2, Project Coordinators will guide their Emerging Community Leaders in developing a Community Diagnosis Plan, or a research plan. The Community Diagnosis Plan will lay out the steps and timeline your team will take to collect the data, or information, you need to:

1. Understand your issue of concern and how it impacts your community;
2. Identify what kind of Policy-System-Environmental change strategies will effectively address the issue; and
3. Determine the community and stakeholder support you have to champion this issue and strategy.

We suggest you take the following steps to guide your Emerging Community Leaders in designing your Community Diagnosis Plan:

1
- Identify Your Commnity Focus Area
- Determine the Rationale

2
- Identify a Potential Policy-System-Environmental Change

3
- Develop a list of Research Questions
- Identify Your Sample

4
- Identify Your Research Methods
- Create Research Teams

5
- Design Your Research Timeline & Steps

6
- Finalize & Do Research Plan

1 | Community Focus Area & Rationale

DEFINITION

Community Focus Area is a problem statement that narrows down your CAM topic to a specific issue and identifies who is being most impacted. The statement answers the "Who" and "What"

The Rationale explains "Why" this is a health equity or social justice issue. The rationale may also describe why this issue matters to your team.

EXAMPLE 1.

Focus Area: More stores sell tobacco in some San Francisco neighborhoods than others, especially in neighborhoods with more low-income communities of color.

Rationale: More low-income, communities of color may smoke because they are more exposed to tobacco advertisements and have easier access to tobacco products due to the higher concentration of stores that sell tobacco. This may result in poorer health outcomes for our communities, such as lung cancer and heart disease, in comparison to wealthier or white communities in San Francisco. As a CAM team who represent communities of color, we want to protect the health of our families and neighbors.

EXAMPLE 2.

Focus Area: Residents in low-income, supportive housing in the Fruitvale Neighborhood disproportionately exposed to second-hand drifting smoke.

Rationale: Low-are income residents living in supportive, multi-unit housing often cannot move out of their housing situation even if their living environment is unhealthy. As a result, these residents are more likely to be continuously exposed to second-hand smoke from their neighbors if their building is not smoke-free. Children, elderly and those with asthma are at risk for health problems like respiratory disease, heart disease and more. As a CAM team, most of us live in multi-unit buildings in East Oakland and have been affected by second-hand smoke. We want to protect the health and housing of our neighbors and community.

EXAMPLE 3.

Focus Area: Fresh fruits and vegetables are harder to find/buy and unaffordable for communities in the Lower Bottom and Acorn Neighborhoods.

Rationale: We noticed that in our neighborhoods it is difficult to buy affordable fresh fruits and vegetables because there isn't a large supermarket nearby so most people buy their food at the corner markets. Corner markets do carry some fresh fruits and vegetables but either they are expensive or they are low quality, so our families do not buy them. As a result, it is hard to make balanced and nutritious meals for our families which can lead to obesity, diabetes and poor health.

EXAMPLE WORKSHOP ACTIVITY: **Focus Area & Rationale**

Objective: Emerging Community Leaders will identify their focus area and rationale for the CAM Project.

End Product: Two statements that declare the CAM project's Focus area and rationale that are specific and clear.

1. Form groups within your to conduct online research your team's topic area (ex. smoke-free housing) to answer these questions, assign a few questions per team:
   - Who is most affected by this issue? Why?
   - How does this issue our community's health and well-being?
   - What other issues in our community does this connect to?
   - Are other neighborhoods or communities more or less impacted by this issue?
   - Who in our community would care the most about this issue?
   - How much will addressing this issue improve the health of our community?
2. Each group will be share back what they found either verbally or on a poster board and other team members will have opportunity to ask them more questions.
3. Project Coordinator explains that based on this initial research, the team will develop two statements: CAM Project's focus area and the rationale. These two statements will be the foundation for what and why they are working on this project.

- **Community Focus Area** is a problem statement that narrows down your CAM topic to a specific issue and identifies who is being most impacted. The statement answers the “Who” and “What”
- **The Rationale** explains “Why” this is a health equity or social justice issue. The rationale may also describe why this issue matters to your team.

4. The CAM team will then come up with their two statements together through brainstorming. Project Coordinator invites the group to throw out ideas to the question:
   - **Community Focus Area:** Which community does our team care about the most because they are most impacted by this issue OR because we are part of that community?
   - **Community Focus Area:** What is the specific issue we are working on that impacts our community (or a specific community) more than another?
   - **Rationale:** Why does our team care about this issue? (How does this impact community’s health in an unfair way or a social justice issue for your community?)
5. Based on the ideas, Project Coordinator drafts the two statements and invites the team to edit and make changes to finalize it.

2 | Policy System Environmental Change Option or Action

DEFINITION

Policy-System-Environmental Change (PSE) addresses health issues at a level that can help communities achieve optimal potential for health.

- **Policy:** Written statement of organization, position, decision or course of action, such as local law or ordinance, state law, agency or institution guidelines, mandates, etc.

- **System:** Changes in organizational procedures, such as resources, personnel and programs
- **Environmental:** physical, observable changes in the built, economic or social environment, such as streets, partnerships or funding allocations.

Your CAM PSE Option must be:

1. Achievable within the next two years
2. Create long-term or sustainable change
3. Compels a decision-making body to create a P-S-E Change

EXAMPLE WORKSHOP ACTIVITY: **Policy System Environmental Change**

Objective: Emerging Community Leaders will identify what their policy, system & environmental change option will be for their community issue.

End Product: One statement that describes their P-S-E option.

1. Review through the definitions of Policy, System & Environmental change.
2. Provide examples of 6–8 relevant Policy, System & Environmental changes in San Francisco or even your organization and ask ECLs to match these to the either Policy, System or Environment. **Examples:**
   - XYZ nonprofit created a written statement that all interns must turn in a time sheet at the end of each month to receive their stipends.
   - In response to interest and input from parents and students, the school district created new Wellness Centers at each of the school sites.
   - The San Francisco Bike Share program has placed a bike share station at all of the BART Stations
3. Split up the group into 3 groups corresponding to: Policy, System & Environment. Each group will spend 20 minutes to come up with 2–3 options as a solution for your community focus area.

Project Coordinator may want to prep some ideas based on your own research of existing solutions to help each group.

4. Each group will then present their ideas and group members will rate the options from a scale of 1 to 3 (lowest to highest) in 4 areas:
   - **Enthusiasm:** I am excited about this idea
   - **Achievable:** We and other community leaders can make this happen in the next two years. This solution has been done in other city.
   - **Long Term:** This idea will make a long term impact on the health of our community
   - **Decision-Making Body**: We have connection to a decision-making body (ex. a director, elected official, agency leader, advisory board, etc.) that can make this change
5. Project Coordinator will score up the policy options and rank them from highest to lowest.
6. For the top 2 options, each group will provide a "case" for the idea, listing out the pros and cons.
7. Group will make a final vote on the option they like the most as their P-S-E option.

3 | Develop a List of Research Questions & Your Sample

DEVELOPING RESEARCH QUESTIONS

Your CAM Project team will develop a list of specific research questions to help you further understand your community focus area and assess the feasibility and community support for Policy-System-Environmental Change option.

Research questions should be specific and typically cover the Who, What, Where, When, Why & How. Below are a few "main research questions" that are typically asked for a CAM project. Your team should come up with specific questions under each of these main Research Question.

MAIN RESEARCH QUESTIONS

Main Research Question: How does this problem (ex. lack of healthy affordable food) impact my community?

Specific Research Questions:

- Who in my community are most impacted by the lack of healthy affordable food options?
- Who in my community thinks lack of healthy food options is a priority and should be addressed?
- What percentage of families in our community cannot buy healthy affordable food on a weekly basis in our community in comparison to another community?
- What are the health and wellness problems that result from not eating healthy food on a regular basis?

EXAMPLE WORKSHOP ACTIVITY: **Research Questions**

Objective: Emerging Community Leaders will create a list of good research questions for the Diagnosis Plan.

End Product: List of 10–15 main research questions

1. Remind the team of what you have accomplished so far in identifying your community Area of Focus, rationale and P-S-E option. State the goal of the workshop to develop a list of research questions that you will explore during your Community Diagnosis phase.
2. **Pair Share Activity:** Pretend that you want to research what your CAM team's ideal summer vacation is. Ask each ECL to write on two different color post-it notes: a "bad research question" and a "good research question". Have the partners share. Ask each partner to revise their partner's "Bad research question" into a "good research question." Have groups share what their questions. Identify any similar questions and debrief the activity.
3. **Review through the "Main Research Questions" (on the previous page) for a CAM project**. Consider posting them on a large post-it note. Ask ECLs why they think these main research questions are important in gathering information for a CAM project. Explain that now your team will generate specific research questions that you will use for your project, but your team needs to decide on some criteria to make your decision on what questions to use.
4. **Developing a Criteria for "Good Research Question" for your team**: Ask your team to create 3–4 criteria on what qualifies as good research question. This criteria will be used to determine which research questions will you use for your final research plan.
5. **Snow Ball Activity to generate questions:**
   - Split the team into three groups, or in pairs. Have each group come up with 2–3 specific research questions for each of the "Main Research Questions", writing them down one a piece of paper each.

Have each group write their group names on the pieces of paper. Crumble them up like snow balls.

- Have a snow ball fight for 2 minutes, then ask each person to pick up as many snowballs as possible. Each person will read out loud the questions that they have and post them on the wall. After each person shared the question, the team will verbally explain and rearrange questions on the wall so that similar questions are grouped together and create a category for the question. This will show whether question was consider important and relevant to your team members. Research questions with more variations or iterations from the group should be on your research list.

6. After all the research questions are read and grouped, the Project Coordinator will summarize the research questions based on the groupings. You may find that there may be a few unduplicated research questions or research questions with many variations.
   - For research questions with multiple variations, ask the team to edit and finalize the research question so that it is a "good research question." Perhaps one group's version of the research question stood out or your group decides to use language or phrases from different parts of each variation.
   - For research questions that are unduplicated, the group can decide if that is a research question that they are interested or is important in including in the list.
   - Identify whether there are main research questions without specific research questions. As a group come up with 1–2 research questions.
7. Develop your final list of research questions.
8. The team with the most points is rewarded with some sort of incentive!

IDENTIFYING YOUR SAMPLE

Based on team's research questions, your CAM project will want to decide who, or your sample (target audience), may have opinions, perspective, expertise and experiences that will help answer your research questions. As part of your Research Plan, your CAM team will be asked to compile a list of 5 stakeholders (ex. key leaders, city departments, community organizations, community members, etc.) that may be impacted by your proposed Policy-System-Environmental change. This list can be a starting point for identifying your sample. Once you identify your sample(s), then your team can decide what type of methods you want to use for your primary research.

Sample Types	What information they may provide	Best Research Methods
Residents in a particular neighborhood or district	Individual experience and opinions about social, environmental, and economic factors that impact their well-being for that specific neighborhood, related to the issue	Surveys Photovoice Focus Groups
Students at specific schools	Youth and student perspective and experience about the issue	Surveys Photovoice Focus Groups
Parents at schools or in a neighborhood	Parent perspective and experience about the issue, especially about how it impacts their children	Surveys Photovoice Focus Groups
Community organization leaders (ex. directors of non-profits & Community-Based Organizations, community organizers, etc.)	Community-wide perspective and opinions about the social, environmental, and economic factors that impact their community or population they serve related to the issue	Key Informant Interviews Surveys Focus Groups

Professionals/ Workers (Ex. Retailers, police, teachers, after school program leaders, etc.)	Specific knowledge and perspective about the issue from the point of view of their profession or work	Key Informant Interviews Surveys Focus Groups
Decision-makers of an institution or agency (ex. Directors of Planning Department, Managers of an apartment complex)	Specific knowledge and perspective about your P-S-E solution, potential challenges/ barriers it may face, achievability, and decision-making process. Expertise in their area that may be related to your issue.	Key Informant Interviews
Elected and Appointed Officials (ex. Board of Education, Board of Supervisors, Health Commission etc.)	Specific knowledge and perspective about your P-S-E solution, potential challenges/ barriers it may face, achievability, and decision-making process. Expertise in their specific area that may be related to your issue.	Key Informant Interviews
Subject Matter Experts (ex. Academic Researchers and Professors and staff at a non-profit focused on a specific issue or focus area)	Expert knowledge, research and insight about your issue or potential P-S-E solutions	Key Informant Interviews
Physical Locations & Places (ex. corner stores, neighbor-hood streets, etc.)	Current conditions or descriptions of the physical, lived environment. Countable, map-able and observable factors that may contribute to your issue.	Observation Photovoice

4 | Identify Your Research Methods & Research Teams

Based on your CAM project's research questions and sample, your team will then decide on what research methods you will want to use. Make sure your team knows that there are specific requirements for Step 2 Diagnosis Research Plan that will help your team understand, explore and gather data on your Community Focus Area. The Step 2 Diagnosis Plan requirements are outlined in the Step 2: Define, Design & Do Diagnosis Tool.

REQUIRED RESEARCH ACTIVITY

1. Table 1. Literature Review
2. Table 2. Existing Policy-System-Environmental Change Review
3. Table 3. Informational Meetings
4. Table 4. Primary Research 1
5. Table 5. Primary Research 2
6. Table 6. Primary Research 3

KEY TIPS

- Review with your team what they learned about primary and secondary research methods from the Emerging Community Leader Diagnosis Training
- Review with your team the required secondary research and the rationale for those activities. *ECLs tend to find secondary research like the literature review, reviewing through existing policies and identifying stakeholders as less exciting and interesting than primary research. However, we often complete secondary research first because it helps lay the foundation for how we may conduct primary research and may inform us about what types of Policy-System-Environmental change solutions are most achievable and effective*.
- Identify what types of secondary and primary research methods would answer each of their main research questions. Some research questions may be answered through multiple research methods.
- Ask ECL team to create groups who want to take the lead on gathering the data for the secondary research and primary research methods.

EXAMPLE WORKSHOP ACTIVITY: **Research Methods Review**

Objective: Emerging Community Leaders will review and recall the various primary and secondary research methods that can be used for a Community Diagnosis.

1. **Play Research Methods Taboo** by creating Taboo cards for each research methods and words they cannot say to describe the research method. Split the ECL team into two teams and see who can go through the most research methods and terms cards.
   - *Examples of Research Method Cards Words:* Surveys, Sample, Key Informant Interviews, Recruitment, literature review, Stakeholder, Policy-System-Environmental Change, informational meetings, Decision-Maker, Photovoice, Research Tool, Data Collector, Observation, Maps, Focus Groups, etc.
2. **Play Research Method Charades**: Same idea as Research Method Taboo just with charades
3. Assign ECL pairs or individuals to a specific Research Method and have them present back to explain their research method

EXAMPLE WORKSHOP ACTIVITY: **Identify Your Research Method**

Objective: Emerging Community Leaders will discuss which research methods are best for their teams' research question and sample.

End Product: Team will decide on the primary research methods and secondary research they want to use to answer each Research Question

Research Method Pros & Cons (from Partners for Collaborative Change Activity)

- As a group create a criteria of how you will decide which Primary Research method your team will use.
- For each Main Research Question, create poster papers labeled with the Research Method and a column for "Pro" and a column for "Con."
- Invite your ECLs to write down at least one pro and con per each method for that specific research question. Make sure that everyone has opportunity to provide input to each of the research method
- Invite your team to discuss base on the Pros and Cons which research method would be best for that research question.

- After going through Pros/Cons of all of the Main research questions, facilitate a discussion with your team on which primary research method your team will want to use based on the criteria you decided in the beginning.

RESEARCH METHODS MATCH AND PITCH!

- As a group create a criteria of how you will decide which Primary Research method your team will use.
- Have your team work in groups or pairs. Give them slips of white papers with the main research questions written on it; two colored papers/post-its with "Primary Research" or "Secondary Research" written on it; and another colored paper/post-its with the different research method types and secondary research activity written on it. Create at least two post-its per method. Use a large post-it or wall to create a place for them to organize/arrange their slips of paper.
- Each ECL group or pair will organize the research question into groupings based on if the questions are best answered through Primary or Secondary Research.
- Then the ECL group will identify which type of primary or secondary research methods would work best for their questions. Some questions can be answered by multiple research methods.
- Ask the groups to present back to team what they decided would be best based on their knowledge about research questions and methods.
- After each group shares, facilitator can ask teams to discuss what is similar and different from each group. And then facilitate with the group the final groupings of questions and methods.
- As a group decide on what primary research method you will want to use based on the criteria you decided at the beginning.

Example for what an arrangement of sticky notes may look like:

	Primary Research	Secondary Research	
Surveys!	• Who in the Mission is exposed to second-hand smoke in their apartment?	• What are some existing policies in San Francisco Related to second-hand smoke?	PSE Research
Surveys!	• What do Mission residents think about smoke-free housing policies?	• What policies have worked in other cities?	PSE Research
Observations Surveys!	• Where do the people smoke if not in their homes or apartments?	• Who makes the decision about a voluntary smoke-free housing policy in apartment buildings?	PSE Research
Key Informant Interviews	• What do apartment managers and landlords think about smoke-free housing policies?	• Who is most affected by drifting second-hand smoke in apartment buildings?	Informational meetings
		• How does having a smoke-free housing policy improve or protect health?	Literature Review

5 | Create Your Research Plan & Timeline

By now, CAM teams should have identified the Research Methods they want to use to answer their main research questions as well created “teams” or “pairs” that will take the lead on planning and leading the data collection. The next steps is for each team to create a timeline of steps they will take to conduct their research, or their Research Plan, that they will use to guide their data collection.

Project Coordinators, you can help ECLs learn about planning or organizing a research project by:

- Discussing why it is important to create a plan and timeline. Use the example of planning a party or event for friends.
- Reminding the ECLs that the plan will guide them through the next 3 months but many times, plans may shift due to circumstances they cannot control.

- For Primary Research Methods, review through key steps of develop research tools s plans may shift due to circumstances they cannot control.
- All team members will help out with each research method by either taking the lead, providing input, collecting data, or helping with data entry.
- Typically, completing secondary research can be done quickly and should be done first because it may inform any primary research questions or protocols.
- For Secondary Research Methods, review through the requirements and the existing.

1. **For Primary Research Methods,** review through key steps of developing research tools, data collection and data analysis. Use the Research Toolkits per type of research method as a guide.
2. **Develop your research tool**: Secondary Research Questions, Survey/ Focus Group/ Interview Questions, Observation Tool, Photovoice guiding questions
3. **Pilot or Test out your research tool & translate**
4. **Create a protocol for data collection**
    - **Who** you will collect the data: ECL pairs, individuals, etc.
    - **What** your sample size is: How many you are aiming for.
    - **Where** you will collect the data: Library, community centers, schools, stores, etc.
    - **When** you will collect the data: Over 3 weeks during workshop time? On your own?
    - **How** you will collect the data (Recruitment strategy): Ask every third random person, recruit high school students from Galileo and Leadership High School through the wellness center, observe data from 5 stores in the Mission neighborhood and 5 stores in the Sunset neighborhood, etc.

- **What** you will say to your participants (Recruitment Script): Introduce yourselves, the research and confidentiality to people participant

5. **Get your research tool & protocol reviewed.**
6. ****Recruit your participants** (Focus Groups, Interviews, etc.): Can start doing this beforehand, give CAM teams at least a month to recruit and set up appointments**
7. **Collect Data & Data Management/Inputting**
8. **Data Analysis**: How & When will you analyze your data

- Guide your team in developing steps for each Research method.
- Make sure to include time for training and practicing data collection in the teams' steps.
- Note: CAM teams' research steps are just broad steps, don't need to be nitty gritty details. Project Coordinators, you will elaborate and provide more detail based on their expertise and knowledge on the actual Step 2 Diagnosis Tool. See the example workplan table in the Step 2 Diagnosis Tool for an example of detail level.

EXAMPLE WORKSHOP ACTIVITY: **Create Your Research Plan**

Objective: Emerging Community Leaders will learn the main steps of research method, develop a research plan with steps and timeline to conduct their conduct their Community Diagnosis

End Product: 3 month timeline of research steps per research method, timeline dates, and responsible team leaders

1. As a group decide on what criteria you will use to make decision about your step orders and timing. Example: realistic, aligns with team time, not rushed, etc.

2. **For each Research Method group team:**
    - Brainstorm and write out broad research steps on a pieces of paper or large post-it notes that they will take to complete their data collection.
    - Organize them based on what order they should be done
    - Have the team then write down how many weeks or days it may take them to complete the steps on the post-it note
3. **Create a Research Calendar & Timeline**
    - Using butcher paper or large post-it notes create a weekly calendar
    - Ask the Secondary Research team to put up their research steps based on what they think makes sense
    - Ask the Primary Research teams to put up their research steps
    - Work as a whole team to move around the steps to create a timeline with start and end dates for each step.
    - Write team leads on each step of who will be in charge of making sure the step is complete.

6 | Finalize & Do Research Plan

The Project Coordinator will utilize the information gathered from the ECL team in Steps 1–5 to fill out the Step 2 Diagnosis Tool deliverable. The Project Coordinator may want to provide more detail or information into the Steps and Timelines for each of the Research Activity charts; however, we ask that the information be true to the input and ideas of the ECL team.

The Funding Agency will also review through your team's plan after it is received. We will provide any additional suggestions on timing and approach that may help your team complete the research plan.

Recommendations:

- Celebrate your team's success in completing their Research Plan!
- Review and share back the Step 2 Diagnosis Tool to your ECL team for their review, changes and approval.
- ECL teams should move forward on the secondary research portion of your Research Plan right away. TFP team will most likely provide more detailed feedback on Primary research portion of your plan.
- Create your own timeline on trainings and workshops that you will need to develop to support your team in meeting their deadlines.
- Identify any areas your team may need support, such as practicing focus group discussions or surveying. Reach out to TFP team and Bright Research Group who are available for support.
- Create a process to track and celebrate the progress of your team as they complete the Research Plan.

Research Method Toolkits & Workshops

ONLINE RESEARCH & EXISTING PSE REVIEW TOOLKIT

The Online Research toolkit is to help guide you and your team in completing secondary research on:

1. Literature Review: Facts and existing Data on your Issue of Concern
2. Existing Policy-System & Environmental Review

LITERATURE REVIEW

Your team will want to conduct online research about your issue of concern to collect information and data that already exists on the issue. (Sometimes this is called a literature review.) In addition to scientific evidence that you can use to support or frame your policy issue, your team may want to look for existing health data on your topic, such as:

- Proportion of people affected by issue of concern (People who smoke, exposure to second-hand smoke, etc.)
- Demographic data on community (education level, ethnicity breakdown, etc.)
- Other data related to social determinants of health (housing, employment, education, environmental factors)

Use the research questions you generated in the Community Diagnosis to guide your online research.

Questions to consider: How does this issue affect health? Community? Environment? And other social determinants of health? What are existing strategies to improve it? What communities are impacted the most?

Why is this important?
Build your stockpile of information, data, statistics, maps, pictures, videos — anything that you can use to make the case for your policy issue. This should both speak to the hearts and minds of people who will likely support you, but also help dispel myths or provide counterpoints to the topics that the opposition raises. The focus groups, interviews, surveys, and photovoice you provide will help further build this story.

Types of Sources

- **Fact sheet:** One sheet that presents data or information in a simple and concise manner. Usually written by agencies and organizations and compiles data or information from various sources. Essentially, they did the research for you!
- **Website:** Sometimes organizations and agencies have information on their websites.
- **White Paper:** A report or paper written about an issue or topic. Most of the time it is written by an expert or research organization.
- **Peer-Review Article/Journal article:** Scholarly article reviewed by other experts in the field before it is published to ensure credibility, accuracy and contribution to the field. Most of the time these are published in journals.

Websites to use to conduct online research:

- Google Scholar
- Google
- Pub Med: https://pubmed.ncbi.nlm.nih.gov/
- Below is a table of tobacco and public health related organization and resources. (Note: These resources may also help you do Existing Policy Research.)

Resources for Research, Policies, & Scientific Evidence:

Websites & Resources	Description	Source
American Cancer Society Cancer Action Network	Advocacy news and resources on Tobacco Control	www.lung.org/associations/states/california
American Heart Association's California Tobacco Endgame Center for Organizing and Engagemen	Resources, news and tobacco policy tracking in California	https://organizingtoendtobacco.org/
Berkeley Media Studies Group	Media and Advocacy Resources and support	www.bmsg.org
Campaign for Tobacco-Free Kids	National tobacco control program with information and campaigns in US and global, focused on youth issues	www.tobaccofreekids.org
Center for Policy Analysis on Trade and Health	Global Led Economy	www.cpath.org
Centers for Disease Control- Tobacco	National Level Data and Issues	www.cdc.gov/tobacco
Change Lab Solutions-Tobacco	Tools, model policy, fact sheets on Tobacco Control Policy	www.changelabsolutions.org/tobacco-control
Framework Convention Alliance	Framework Convention	www.fctc.org
Hesperian Health Guides	Health Education Resources	www.hesperian.org
International Network of Women Against Tobacco	Global Tobacco Control	https://inwat.org
Prevention Institute	Public Health tools and training	www.preventioninstitute.org
Public Health Institute	Public Health tools and training	www.phi.org
San Francisco Tobacco-Free Project	San Francisco Tobacco Project Organization Website	https://sanfranciscotobaccofreeproject.org
Stanford Research into the Impact of Tobacco Advertising	Advertising, Advertising gallery, podcasts, and resources	https://tobacco.stanford.edu/
The Loop	TA and Support for CA tobacco control	http://theloop.ucsf.edu

Tobacco Atlas 5.0	Global Tobacco Control Data & Topics	www.tobaccoatlas.org
Tobacco-Free California	California Dept Public Health- Tobacco Control	www.tobaccofreeca.com
WHO Framework Convention on Tobacco Control	Global Tobacco Control	www.fctc.org
San Francisco & California-Based Data Sources		
Behavioral Risk Surveillance Survey	National and County level health data	www.cdc.gov/brfss
California Health Interview Survey (CHIS)	California and County level health data	http://ask.chis.ucla.edu
CorpWatch	Data on corporate malfeasance	www.corpwatch.org/index.php
Data SF	San Francisco level data, various	https://datasf.org/opendata/
San Francisco Health Improvement Partnership (SFHIP)	San Francisco health priorities and data	http://www.sfhip.org
Child Healthy Kids Survey (CHKS)	California Public School student data	https://calschls.org/
United States Census/ American Fact Finder	Census Data	Data.census.gov

Resource on conducting research and citations:

https://owl.purdue.edu/

Online Research:

It’s helpful to organize the source and facts that you find through online research to refer to. Here’s a simple way to do so:

Article/Report
Example: Electronic Cigarette Fact Sheet
Citation/Source
San Francisco Tobacco-Free project (2015) Electronic Cigarettes. Retrieved from: http://sanfranciscotobaccofreeproject.org/electronic-cigarettes
Relevant Research Question
What are the harms of electronic cigarettes? What’s in an electronic cigarettes? What is youth usage of e-cigarettes
Key Facts
Electronic cigarettes emit aerosol that often contains nicotine, ultrafine particles and low levels of toxins, introducing new pollutants into the air. National Youth Tobacco Survey by the Centers for Disease Control and Prevention (CDC), in 2013, 263,000 teens had used e-cigarettes but had never smoked traditional cigarettes. This represents a 3-fold increase from the 79,000 young people reported in 2011.

Existing Policy Research: San Francisco & Other Jurisdictions

ASSESSING EXISTING STRATEGIES

CAM teams will want to conduct research on existing policies, system & environmental changes that are related to your issue of concern within San Francisco and other jurisdictions (counties, cities, nationally).

For example, you may want to see if there are policies that already enforce smoke-free zones in housing in San Francisco AND any policies in other jurisdictions that are stronger than our county's policy. It will be important to learn more about these policies and any pertinent information, such as: groups that worked on the policy as well as strengths and weaknesses of the policy.

Why is this important?

Understanding existing policies, system and environmental change in San Francisco will help you identify gaps, loopholes, or areas for improvement within the city's existing policy structure. This information can help you inform policy-makers, stakeholders, and community members about the problem, or what is perpetuating the problem. Policies often build on each other, so having a clear understanding of other policies in the city will help inform your own policy issue. In addition, this research will help you identify supporting and opposing groups, individuals, or stakeholders who you may need to work with or influence if you want to achieve your policy issue.

In addition, looking to similar PSEs in other jurisdictions will help provide you with alternative and effective policies that you can promote in San Francisco. Showing policymakers and stakeholder's examples of policies in other cities (and describing the impact or dispelling any myths about their impact) may help generate support. If there are other jurisdictions that have passed similar policies to the one you are proposing, you may also want to research articles and media pieces that can help shed light on what messages, issues, or concerns were resonating in the news. This may set your expectations for what will happen when you start working on the issue in San Francisco.

Here are different ways to find policies:

- https://codelibrary.amlegal.com/ has a comprehensive library of existing policies and codes
- **ChangeLab Solutions has toolkits and fact sheets on various policies:**
    - https://www.changelabsolutions.org/tobacco-prevention
    - http://www.changelabsolutions.org/publications/tobacco-laws-affecting-california
- Talk to experts who may know about existing policies (Use the tips in the Interview Toolkit to interview them!)
- Google it!

Existing Policy-System-Environmental Change Table:

Existing Policy-System-Environmental Change	Specific Jurisdiction (City, County or Federal)	How does it relate to your issue?
Ex. Housing and Urban Development requires all Public Housing Authorities to be smoke-free (indoor units, indoor common areas and administrative buildings) by February 3rd, 2018 with a 18 month implementation period. *Source: https://www.hud.gov/program_offices/healthy_homes/smokefree*	*Federal*	*Our CAM team wants to address second-hand exposure in our PHA housing complex. Even though there is a HUD policy there are still smokers in our building and want to make sure that people can find a designated place to smoke and protect everyone else's health.*

LIST OF DECISION-MAKERS OR LEADERS

The CAM is all about finding a PSE solution that will be achievable, sustainable and compels a specific decision-making body or leader to make a lasting change to improve and protect health of the community. In order to know who to compel, it is important to create a list of potential decision-makers who actually has the decision-making power to support or oppose your PSE.

Decision-makers can be elected or appointed officials, managers of apartment buildings, directors of a city agency or institution, retail associations, directors or leaders of a community organization or institution. They are the ones who have the power to make the change you want.

Often you can conduct online research or informational meetings to identify these decision-makers and what process they can use to support your PSE solution.

Your Decision Maker

Decision-Maker *Specify which elected official, city agency staff, community organization director, manager of a property etc.*	**Why would they care about your issue or the Policy-System-Environmental change you are proposing?**	**What process would they need to complete to support your PSE?**
Ex. Director of Lucky Bridge Housing Alexa Smith	*The director wants to comply with the HUD policy but also cares about the housing first value of our housing complex. She doesn't want to have to evict people from their homes if they smoke but also wants to protect the health and property of the housing complex*	*The director could create a Lucky Bridge Smoke-Free Housing policy that provides details on how the smoke-free policy is implemented, including designated outdoor smoking areas, step-wise penalties for smoking indoors, etc.*

LIST OF STAKEHOLDERS

Stakeholders are impacted by the issue or the Policy-System-Environmental change you want to make. They can be decision-makers, community members, community organizations, city and county agencies and institutions, types of professionals/workers, experts in the issue, etc.

Listing out stakeholders for your project will help identify who you may want to reach out for informational meetings, key informant interviews, or help you recruit participants for your focus groups, surveys, etc. Also, stakeholders can be supporters or allies of your work or may be oppose to what you are doing. It's important to identify both types of stakeholders to get their varied point of view.

Your Stakeholders

Stakeholder Specify the community leader, community organization, type of community member, city agency, other institution and businesses	**Contact Information**
Ex. Community Residents in Lucky Bridge Housing	*Lucky Bridge Program Manager: Robert Wong at Rwong@luckybridgehousing.org* *He is the gatekeeper to the residents and know everyone's name and contact.*

Why would they care about your issue or the Policy-System-Environmental change you are proposing?
Low-income, elderly residents in the housing complex are the ones who are being exposed to second-hand smoke and have complained in the past.

How will you engage them to support or help your CAM project?
Potentially conduct a survey or focus group

You are also required to do 2–3 informational interviews with key stakeholders to find out more about what they are doing to currently address your issue, learnings and challenges they experience and any support or tips they may have for your team. Use this table to help organize information gathered from them.

Stakeholder Specify which elected official, city agency staff, community organization director, manager of a property etc.	**What are they currently doing to address your issue?** **What kind of learnings or challenges they face in moving this issue forward?** **How will can they support or help your team?**
Robert Wong: L ucky Bridge Program Manager	*The Program Manager has received complaints about drifting smoke from residents and reminded everyone that the building will become smoke-free which can lead to eviction. Residents are worried about their housing security and Robert wants to ensure that the elderly, marginally housed residents feel safe and secure in the house. The Program Manager wants to bring it up to the Director of Lucky Bridge Housing but he is worried that the Director (Alexa Smith) is not interested or has the time in developing protocols and rules. Robert will connect our team with the residents to do a survey or focus group and educational meeting as well as connect us with Alexa so that we can talk to her.*

Interview Toolkit

The interview toolkit is to guide you in planning, developing and conducting an interview. Planning and forethought will help make sure that you get the best information you need to plan a successful campaign. Feel free to use all or parts of it with your team or just as a guideline for yourself as a Project Coordinator. Here's what's in the tool kit:

1. **Checklist**: Action items and suggested time frame to plan and complete the interviews
2. **Guide**: Methods and strategies to consider in planning the interviews
3. **Protocol:** Plug and play form to help you develop an interview protocol, or the script that the interviewee should use. Modify the language to fit your team's style or just the highlighted portions, as you see fit.

INTERVIEW CHECK LIST:

Two months prior:

Identify who you want to interview (ex. experts, community leaders, agency staff), as well as the interviewers! Think about who is being interviewed, what they care about, and who would be best to interview them. Is it one Emerging Community Leader? Two or more ECLs? The Project Coordinator with support from the ECLs?

If needed: identify whether or not any of the people being interviewed would prefer to speak in a language other than English. If so, identify someone who can help translate interview materials and/or conduct the interview in that preferred language.

Develop interview Guide (see next page). This initial step will help you develop the interview questions that will be in the protocol.

1 month prior:

- ☐ Develop interview Protocol (see below). This protocol should include a script and the list of questions that you want to ask the people being interviewed.
- ☐ Submit draft interview Protocol to Tobacco-Free Project and Evaluator for feedback.
- ☐ Reach out to the people being interviewed and set up time for the interview either in person or over the phone.

2 weeks prior:

- ☐ Finalize the interview Protocol
- ☐ Finalize the interviewers and the note-takers for all interviews
- ☐ Practice interview protocol and questions with the team of interviewers

1 week prior:

- ☐ Gather supplies:
  - ☐ Recording device (Note: If needed, contact the Funding Agency)
  - ☐ Notepaper & pens
  - ☐ Confirm interview time, location or phone number with the person being interviewed

Within a week after interview:

- ☐ Debrief interview with team to decide on key themes from interview and the interview process to improve or continue to do great work for the next one
- ☐ Upload recording (if available) and type up notes. If possible type up quotes from the recording based on key themes; no need to transcribe the whole interview.

Interview Guide

The interview guide will help you plan for your interviews. This consists of two pieces: the Stakeholders Table & the Outreach Strategy.

STAKEHOLDERS TABLE

This table will help organize the people you will interview, as well as why you want to talk to them. In other words, what do they know about that I want to know? What do they care about that I want to learn more about? What are their opinions about my policy issue, and what do they know about the opinions of other key stakeholders (ex. proponents, opponents)?

Once you start reaching out to stakeholders to interview them, you can fill out the last two columns of the table, which includes information about when/where the interview will occur and who will be conducting it.

Stakeholder Name	Organization	Contact Information	Reason for Interview	Date, Time, Location of Interview	Name of Interviewer

OUTREACH STRATEGY

Once you have identified your stakeholders, you need to start reaching out to them to schedule the interviews. Before you call, consider: what would you say to convince the stakeholder to be interviewed? Some tips of what you should communicate when scheduling:

- Who are you and what organization are you with?
- What is the purpose of the interview?
- How long will it take?
- How would it benefit the public or the stakeholder?
- Do you or your organization have any existing connections or past experiences working with the stakeholder, or do you know someone who referred you to them? If so, mention it!

Interview Protocol

The interview protocol is the script that the interviewer should follow once they are in the room with the stakeholder. A typical protocol includes an introduction with disclosures about the purpose of the interview, a series of questions, and a conclusion that includes next steps.

SCRIPT FOR INTRODUCTION:

Thank you for taking the time to meet/talk to us today. We are working on [community issue] and wanted to get your expert thoughts and opinions on the topic. We have a few questions we wanted to ask you and your responses will be used to help ___________________. We want your honest opinions and responses. The interview will be no longer than 30 minutes.

My friend [Note taker] is also here, and she will be taking notes during our conversation. If during the course of the conversation you want to share any information that you would like us to keep confidential, please let us know.

[If using a recorder] If you consent, we would like to record this conversation once we get started with the questions. We will only record if everyone consents or agrees to this. If you don't want to be recorded please let me know now, and we will only take handwritten notes.

Before we begin, do you have any questions for us?

[If recording] We will now begin recording the conversation.

INTERVIEW QUESTIONS

- 5–8 Open ended questions
- No leading questions, and no Yes or No questions
- "Probes" are phrases for the facilitator to offer as a suggestion/idea in which the group can respond to if they are having a hard time answering the question.
- It's okay to go off script or not go through all your questions

SAMPLE QUESTIONS:

1. Can you tell me about how cigarette litter and other litter is cleaned up by the city and your agency's role? Who does it? How is it implemented? What are the funding sources?
2. Can you tell me about the challenges of keeping the streets of San Francisco clean, especially in our neighborhood?

SCRIPT FOR CONCLUSION:

"Thank you so much for taking the time to respond to our question."

[At the end of the interview, you may want to provide information to the participant on a way to be engaged in your project or about your issue of concern.]

"If you have any questions about the interview or our project here is someone you can contact: _____________."

[or]

"If you want to be notified about the progress of our project, please sign up here: _____________. "

Interview Training Example

1 | Interview Refresher (15–30 mins)

INTERACTIVE TEACHING 1 (5–10 mins)

Facilitator 1 will walk through a serious of questions (Who, What Where, When, Why, How) about interview. These questions will be on large post-it notes:

Questions	Answers
<u>Why</u> does one conduct as interview? Why are you conducting a interview?	• Get a stakeholder or expert's thoughts, opinion, concerns about an issue that affects them, their community or organization
<u>Who</u> participates in a interview? Who will you be interviewing?	• Interviewer • Informant • Note Taker
<u>What</u> kind of questions do you ask in interviews?	• Open ended • Not leading

When is a interview held?	• Time convenient for informant • 30 minutes to an hour
Where is a interview held?	• In person at a convenient and quiet location • Telephone
How does one conduct a interview?	• Interviewer goes through introduction, questions and closing • Note taker takes notes; or record if informant agrees • Informant does most of the talking, 80%

INTERVIEW CONDUCTING AND NOTE TAKER SKILLS (15 mins)

Facilitator 2 will ask: "What are some qualities/skills of a good interviewer?" Example responses:

- Be professional and respectful.
- Be a Leader: direct the conversation, but don't lead the conversation into a direction. Let their responses lead the conversation. Don't necessarily need to follow your guide exactly.
- Listener/Learner: actively listen to the informant and probe for more information.
- Be friendly & non-judgmental: so that the informant feels respected, comfortable and open to share, watch for non-verbal responses. Don't provide negative or positive comments to responses.
- Flexible: Interviews don't always go as planned, be able to problem solve.
- Prepared: Practice and study through the steps and interview steps.

Facilitator 2: "How do you know when someone is listening to you?" Example responses:

- Encourage responses: "Uh huh" "Ah, I see"
- Body language: lean forward, make eye contact

Facilitator 2: *What does it mean to probe for more information?*
Probe when informant gives limited information; when s/he uses words that don't provide more meaning ("good", "easy") or you are unsure what s/he said. Probe by asking them to:

- Elaborate: "Tell me more?"
- Exemplify: "Can you give me an example?"
- Explain: "I'm not sure if I heard you correctly. Can you explain one more time?"
- Specify: "What do you mean by, you think smoking is bad"?

Notetaker can record the conversation via audio if people agree (consent) but still should also take notes.

Facilitator 2: *What are some qualities of a good note-taker?*

- Fast, detailed and good handwriting — good quality of notes is important
- Only take notes. Your summary of people's responses is through your interpretation; keep it as close to what is intended
- Write some direct quotes if possible
- Write observations from non-verbal cues

2 | Activity: Interview Practice (30 mins)

- Split into 2 Groups with one Funded Agency staff.
- Instructions to Group- Facilitator 2
    - Each advocate will get a copy of an Interview Protocol Script
    - Group has 10 minutes to:
        i. Fill in the blank for the Introductory Script
        ii. Reword given questions to be open-ended
        iii. Elect one volunteer interviewer and one note taker
    - Volunteer interviews Funded Agency staff for 10 minutes
    - ECLs provide constructive feedback to interviewer (5–7 mins)
- Groups come back together for a Debrief

Interview Protocol

The interview protocol is the script that the interviewer should follow once they are in the room with the stakeholder. A typical protocol includes an introduction with disclosures about the purpose of the interview, a series of questions, and a conclusion that includes next steps.

SCRIPT FOR INTRODUCTION:

Thank you for taking the time to meet/talk to us today. My name is [Name of Informant] and I am part of [Organization]. We are working on [community issue].

We want to get your expert thoughts and opinions on the topic. We have a few questions we wanted to ask you and your responses will be used to help us to:____________

We want your honest opinions and responses. The interview will be no longer than 30 minutes.

My friend/colleague [name of notetaker] is also here, and she will be taking notes during our conversation. If during the course of the conversation you want to share any information that you would like us to keep confidential, please let us know.

If you consent, we would like to record this conversation once we get started with the questions. We will only record if everyone consents or agrees to this. If you don't want to be recorded please let me know now, and we will only take hand-written notes.

Before we begin, do you have any questions for us? We will now begin recording the conversation.

Practice Interview Questions:

Please change these questions to be open-ended and not leading.

1. Do you know anything about how retail advertisement of unhealthy things, like tobacco, alcohol and sugar sweetened beverages, can be bad for youth and community?
2. Do income communities and neighborhoods have more retail advertising in corner stores?
3. Are current local and state laws that affect retail advertising in San Francisco any good?

Focus Group Discussion Toolkit

The focus group discussion (FGD) toolkit is to guide you in planning, developing and conducting a focus group discussion. Planning and forethought will help make sure that you get the best information you need to plan a successful campaign. Feel free to use all or parts of it with your team or just as a guideline for yourself as a Project Coordinator. Here's what's in the tool kit:

1. **Checklist**: Action items and suggested time frame to plan and complete the focus group
2. **Guide**: Methods and strategies to consider in planning the interviews
3. **Protocol:** Plug and play form to help you develop a FGD protocol, or the script that the facilitator will use during the focus group. Modify all language to fit your team's style or just the highlighted portions.

FOCUS GROUP CHECK LIST:

Two months prior

- ☐ Draft and develop FGD Guide (see below)
    - ☐ Identify target population. Focus groups are strongest when the participants have something in common, ex. race/ethnicity, age, neighborhood, gender, etc.
    - ☐ Identify and recruit a partner organization or school that reaches this population, and recruitment strategies that can help get focus group participants
    - ☐ Identify the best location, date and time for your focus group, in collaboration with your partner organization or school
- ☐ If needed: identify whether or not participants in the focus group would prefer to speak in a language other than English. If so, identify someone who can help translate focus group materials and/or conduct the focus group in that preferred language.

1 month prior

- [ ] Develop FGD Protocol (see below). This protocol should include a script and the list of questions that you want to ask the focus group.
- [ ] Submit draft FGD Protocol to Funding Agency or others for feedback
- [ ] Recruit 16–20 participants by emailing, calling, flyers, or word of mouth; asked for a RSVP (through direct recruitment and/or through partner organization)
- [ ] Figure out incentive (gift cards, food, etc.) and offered that incentive during outreach and recruitment

2 weeks prior

- [ ] Finalize the FGD Protocol
- [ ] Finalize the facilitator and note-taker for the focus group
- [ ] Practice FGD protocol and questions with facilitator team

1 week prior

- [ ] Gather supplies:
    - [ ] Recording device (Note: If needed, contact TFP staff)
    - [ ] Notepaper & pens
    - [ ] Activity materials (pens, dots, post-its, etc.)
    - [ ] Name tags & markers
- [ ] Confirm focus group time and RSVPs with partner organization or school. Use phone calls, emails, or texts to remind participants of the focus group date, time, location, and incentives.

Within a week after focus group discussion

- ☐ Debrief focus group discussion with team to decide on key themes from focus group discussion and the FGD overall to improve or continue to do great work for the next FGD
- ☐ Upload recording (if available) and type up notes. If possible type up quotes from the recording based on key themes; no need to transcribe whole focus group discussion

Focus Group Discussion Guide

This focus group discussion guide will help you plan for your focus group. This includes the target population and the recruitment strategy.

TARGET POPULATION

1. **Purpose of the focus group.**
   What is the overarching research question that you are trying to answer? What do you want to learn about from this focus group?
2. **Describe your target population**
   For example, where do they live? What age range? What gender? What community do they represent?
3. **Rationale for target population**
   Why did you decide to target this population? How does your community issue relate or affect them? What kind of unique experience or perspective do they bring?

RECRUITMENT STRATEGY

You will usually recruit participants through partner organizations, such as schools, community based organizations, etc., that have existing groups or can gather people for you. This allows you to work with a trusted organization that already interacts with your target population.

4. How will you reach the people you want to be in the focus group? What organization has access to my target population? (Table follows)

Focus Group Recruitment

Organization	Location	Total # they can recruit*	What they need to recruit (ex. flyer, phone calls, texts, in-person pitch, etc.)	Contact Person

*Each focus group should be 8–10 people. Try to recruit two times as many people, ex. 16–20.

5. What are you doing? What is the purpose of the FGD? How would it benefit the public or the partner? How long will it take, and what incentives can you provide?

Focus Group Discussion Protocol

The protocol is the script that the facilitator should follow once they are in the room with the focus group participants. A typical protocol includes an introduction with the purpose and ground rules for the focus group, tips about how the information will be used (ex. notes and/or recording), a series of questions, and a conclusion.

SCRIPT FOR INTRODUCTION:

"Thank you all for being here today, and thank you to [organization] for being the host and helping us come together today. My name is [facilitator], and I am with [organization]. We have a handful of questions that we want to ask you today about [community issue of concern], and we would like you to share your honest feelings — your perspective is important. Your responses will be used to help ________________________."

Before we start I wanted to share a few ground rules:

1. Everyone participates. Share your feelings, concerns, confusions, or opinions about the questions. You don't need to answer every question—but please share with us throughout our conversation today. We value your voices and opinions.
2. There are no wrong answers to any of the questions. We want to hear your honest responses especially if it differs from the rest of the group.
3. Respect each other's perspectives. If you disagree, that's fine, but please do so respectfully.

4. One person talks at a time. Let's try not to interrupt each other. It's my job to make sure everyone who wants to talk gets the chance to do so.
5. This is a confidential conversation. We aren't going to tell anyone about what you said in this room. This information is just to help us better understand what your community wants or needs.

The focus group will take about an hour. [If food is provided]: Please help yourself to the food that is provided. [If an incentive like a gift card will be provided]: At the end of the hour, you will receive [incentive] as an appreciation for your participation today.

NOTES/RECORDING

My friend [Notetaker] is also here, and she will be taking notes during our conversation.

[If using a recorder] "If you consent, we would like to record this conversation once we get started with the questions. We will only record if everyone consents or agrees to this. If you don't want to be recorded please let me know now, and we will only take hand-written notes.

Are there any questions before we begin?"

INTRODUCTIONS

Before we get started with questions, I'd like to go around the room, and have everyone share their first name, neighborhood you live in, and [ice breaker question].

[If recording] We will now begin recording the conversation.

Focus Group Participants

Name	Neighborhood	Age (estimate, if needed)	Race/ethnicity (estimate, if needed)

FOCUS GROUP QUESTIONS

Remember:

- 5–8 Open ended questions
- No leading questions, no Yes or No questions
- Include activities (dot activity, ranking, etc.) Funded Agency is available to help you plan engaging activities.
- "Probes" are phrases for the facilitator to offer as a suggestion/idea in which the group can respond to if they are having a hard time answering the question.

Sample Questions:

1. **Activity:** You have two colors of post-it notes, one green and one pink. On the green post-its, name one reason that you or your family eats healthy foods (ex. fruits, vegetables, whole-wheat etc.). On the pink post-it, name one reason that you or your family do not eat healthy foods. Use as many post-its as you want. Just remember to write down one reason per post-it note. Take 3 minutes to write it down. Then we'll go around and share your reasons and see what is similar and different within this group.
2. What do you normally buy from corner stores in your neighborhood? What do you think about buying fruits and vegetables from the corner store? [Probes: advertising, store cleanliness, produce quality and variety, close by, etc.?]

SCRIPT FOR CONCLUSION:

"Thank you so much for taking the time to be part of this discussion.

At the end of the FGD, you may want to provide information to the participant on a way to be engaged in your project or about your issue of concern."

OPTION 1:

"If you have any questions about the focus group discussion or our project here is someone you can contact: _______________."

[or]

"If you want to be notified about the progress of our project, please sign up here."

OPTION 2: Inform participants of resources or educational materials about the issue of concern.

Focus Group Training Workshop Example

TRAINING OVERVIEW

Activity	Objective	Time Frame
Focus Group Refresher	• Youth review through basics of focus group discussion through a Who, What, When, Where and How Activity • Why does one conduct as focus group? Why are you conducting a focus group? • Who participates in a focus group and how many? Who will you be holding focus group discussions with? • What kind of questions do you ask in focus groups? • When is a focus group held? • Where is a focus group held? Where will you be holding your focus group? • How does one conduct a focus group?	15–20 minutes 0.5 hours
Facilitator and Note Taker Training	• Youth learn basic tips on facilitating and note taking from trainer • Youth practice being a moderator by reading the introduction script. Peers provide feedback. • Youth practice mock focus group discussion through role play, feedback and reflection.	15 minutes 15–30 minutes 45 minutes 1.5 hours

FOCUS GROUP REFRESHER (15–30 MINS)

The Funded Agency will walk through a serious of questions (Who, What Where, When, Why, How) about focus group discussion overall along with corresponding questions about the CAM project's focus group discussion. Each question will be put on a post-it sheet.

Questions s	FGD	CAM Project FGD
Why does one conduct as focus group? Why are you conducting a focus group?	• Get input on an issue from a group • Explore how and why people think, believe or behave a certain way • More in depth information than just a survey	To explore what community members think about cigarette litter in their community and how to solve the issue

<u>Who</u> participates in a focus group and how many? Who will you be holding focus group discussions with?	• 6–8 people; recruit 2x more • Homogeneous group, but try to not to have people who know each other	• 6–8 community members • X # focus groups • Recruited from?
<u>What</u> kind of questions do you ask in focus groups? What are some questions you will be asking people in your discussion?	• Open ended • Not leading • Include activities	• What are your thoughts about the litter in the Tenderloin neighborhood? • What do you know about cigarette litter and its affects? • What do you think would help reduce cigarette litter in our community?
<u>When</u> is a focus group held? When will you be holding your focus group discussion?	• Time convenient for participants • 45 minutes to an hour	
<u>Where</u> is a focus group held? Where will you be holding your focus group?	• A convenient location • In a enclosed area where there is little disturbance and confidentiality	
<u>How</u> does one conduct a focus group? How will you be conducting your focus group?	• Facilitator goes through introduction, questions and closing • Note taker takes notes; or there is a recording if people agree • Participants do most of the talking! • Participants receive a small gift or food for participating	This will be answered through the following activity. Youth will have their own responses

Conducting a Focus Group

1 | Teaching Portion- FGD Facilitating Skills (10 mins)

ECLs will get some form of a worksheet

WHAT ARE SOME QUALITIES/SKILLS OF A GOOD FACILITATOR?

- **Leader:** Direct the conversation, but don't lead the conversation into a direction.
- **Listener:** actively listen to the participants.
- **Non-judgmental:** so that participants feel respected, comfortable and open to share.
- **Flexible:** focus groups don't always go as planned, be able to problem solve.
- **Prepared:** Practice and study through the steps and focus group steps.

WHAT DOES THAT LOOK LIKE?

Direct the conversation by...

- Set the tone by being professional and respectful; establish ground rules.
- Asking open-ended questions activity: practice changing these questions from leading to open.
- Dealing with personalities (give examples and how to divert. Ask participants ideas too.)
    - **Talkative Tim:** Dominates the conversation by providing a lot of opinions; doesn't allow for other people to talk
        - Invite someone else to share: "Thanks for sharing Tim, you provided a lot of great information. Jeff can you tell us what you think?"
    - **Tangential Tammie:** Can't keep thoughts in track and will start talking off topic

        - Remind them of the topic at hand: “Thanks for sharing about your grandma Terry, but let’s get back on track and talk about cigarette litter. Lisa, what do you think…”
    - **Shy Sally:** Doesn’t speak up but may have lots to share
        - Invite them into the conversation: “Hey Sally, we haven’t heard from you yet. What do you think about…
    - **Contradicting Connie:** Contradicts what everyone says or has a negative attitude
        - Remind them that there is no right or wrong answer. Divert conversation to a new person.
        - May want to ask the note-taker or someone else to take the person aside and ask them to leave (only if absolutely necessary)
    - **Pleasing Paul:** Will agree with what everyone say
        - Ask them to elaborate “Can you tell me more? What do you think?”

Get people to talk to you by showing that you are listening.

- **Ask Group:** How do you know when someone is listening to you?
- **Encourage responses:** “Uh huh” “Ah, I see”
- **Body language:** lean forward, make eye contact
- **Probe:** when participants give limited information; when they use words that don’t provide more meaning (good, easy,) or you are unsure what they say. Probe by asking them to:
    - Elaborate: “Tell me more?”
    - Exemplify: “Can you give me an example?”
    - Explain: “I’m not sure if I heard you correctly. Can you explain one more time?”
    - Specify: “What do you mean by, ‘you think smoking is bad’”?
- **Ask yourself:** What else do I need to ask to understand what this person means? Am I hearing everything I need to know?

Be non-judgmental

- Watch your nonverbal response
- Don't provide positive or negative comments about people's responses

Be flexible- Tell story about focus group discussion

- If less than 3 people show up, consider doing one-on-one interviews with people instead
- If people show up later than 15 minutes, tell them that they cannot join because it will disrupt the conversation
- If no one shows up, consider a new location or time
- If too many people show up, take first 8-10 people. Find another time for other participants to do an additional focus group discussion

2 | Teaching Portion, Notetaker

- Can record the conversation via audio if people agree (consent) but still should take notes
- Note Taker Skills
  - Fast, detailed and good handwriting – good quality of notes is important
  - Only take notes- your summary of people's responses is through your interpretation; keep it as close to what is intended
  - Write some direct quotes if possible
  - Write observations from non-verbal
  - Logistics:
    - Use participant #s or initials
    - Type up all of your notes within 24 hours
    - Discuss your notes with facilitator or staff for agreement

3 | Practice Activity 1, FGD Facilitating Skills

- Trainer will model using the facilitator guide for a “mock” focus group – only introduction script + first question (5 mins)
- ECLs provide any input or observations (5 mins)
- ECLs practice facilitator introduction with a partner (5–7 minutes)

4 | Practice Activity 2: Mock Focus Group

- ECLs volunteer to role play: facilitator, note-taker and participants
- Participants will have various roles
- Practice the focus group for 15 minutes; 5–7 of reflection and feedback; 2 times

Survey Toolkit

The survey toolkit is to guide you in planning, developing and conducting a survey. Planning and forethought will help make sure that you get the best information you need to plan a successful campaign. Feel free to use all or parts of it with your team or just a guideline for yourself as a Project Coordinator. Here's what's in the tool kit:

1. **Checklist**: Action items and suggested time frame to plan and complete the survey
2. **Guide**: Methods and strategies to consider in planning the survey
3. **Protocol:** Plug and play form to help you develop a survey. Modify all language to fit your team's style or just the highlighted portions.

Survey Check List:

2 months prior

☐ Draft & develop your Survey Guide

- Identify your target population and ideal sample for data collection, ex. how many people do you want to complete the survey
- Identify and recruit partnering organization or school (if applicable)
- Identify locations, dates and times where you can administer the survey (work with your partner organization to decide on these strategies)

☐ Begin drafting and developing your survey

- Pre-test your survey with a few people
- If needed: identify people to help with translating the survey for populations who may not speak English

1 month prior

☐ Submit draft survey to Funding Agency or others for feedback

2 weeks prior

- ☐ Finalize survey, including language versions, and submit to Funding Agency or others for final approval
- ☐ Develop online version for easy data entry via Survey Monkey or Google Forms
- ☐ Figure out incentive (gift cards, small gifts, etc.) for participation, if possible
- ☐ Delegate roles for survey collection amongst team (data collector, data entry, data analysis)

1 week prior

- ☐ Print copies of surveys and number surveys (If paper)
- ☐ Gather supplies: pencils and clip boards, or iPhones or iPads, if possible

Data collection period (2–3 weeks max)

- ☐ Conduct surveys
- ☐ Organize surveys when they are complete
- ☐ Debrief with team on success and areas for improvement for conducting survey and survey tool

Within 1–2 weeks after data collection is complete

- ☐ Enter any data from paper applications into Survey Monkey or Google Forms

Within 1–2 weeks after data collection is complete

- ☐ Enter any data from paper applications into Survey Monkey or Google Forms

Survey Guide

TARGET POPULATION & SAMPLE SIZE

1. **Purpose of the survey**
   What is the overarching research question that you are trying to answer? What do you want to be able to say about public opinion after you complete this survey?
2. **Describe your target population**
   For example, where do they live? What age range? What gender? What community do they represent?
3. **Rationale for target population**
   Why did you decide to target this population? How does your community issue relate or affect them? What kind of unique experience or perspective do they bring?
4. **Sample Size**
   How many people will you be surveying?

RECRUITMENT STRATEGY

There are generally two ways to reach people for a survey:

1. **Public Intercept Survey:** Going out in the neighborhood and talking to people in public places
2. **Through partner organizations**: Reaching out to a partner organization or your own organization to see if there are events where you can survey people

What would you say to convince either the public or a partner organization to do the survey?

- What would you say to convince either the public or a partner organization to do the survey?
- What are you doing? What is the purpose of the survey? How would it benefit the public or the partner?

How will you reach the people you want to sample?

How I will reach people	Location(s)	Goal # of Surveys per Location	Contact Person

Survey Protocol

Remember:

- Be friendly, polite and respectful when approaching people for a survey.
- Survey participation is voluntary. People may say no. Try not to take it personally
- When talking about the survey do not provide any health education or opinions on the topic since it may affect (or bias) their response

SCRIPT FOR INTRODUCTION:

"We, [Advocate Team, Organization, etc.] are conducting a survey of [target population] to ask you what you think about [community issue]."

Your responses will remain an anonymous. We are not collecting any names or identifiable information with this survey.

The survey should only take [#] minutes to complete. Participants who complete this survey will get [incentive].

Survey Questions

Remember:

- No more than 10 questions
- Yes, No, or Multiple Choice Answers
- No leading questions
- Use survey questions that have been used in previous surveys
- Include demographic questions (age, gender, neighborhood, language etc.)

SAMPLE SURVEY QUESTIONS:

Here are a few types of survey questions you can ask. You should feel free to work with the Funding Agency or others to craft strong survey questions.

1. Have you seen any advertising about the health harms of electronic cigarettes (e-cigs, vape pens, vaporizers)? *Check all that apply*
   - ☐ Yes, on TV and Radio
   - ☐ Yes, on BART or MUNI or at BART or MUNI stations
   - ☐ Yes, online
   - ☐ Yes, somewhere else:________________________________
   - ☐ No
   - ☐ Don't know
2. What factor most affects your ability to get the fruits and vegetables you need or want? *Please select one answer.*
   - ☐ Cost of food
   - ☐ Quality of food
   - ☐ Time for shopping
   - ☐ Distance to the store
   - ☐ Safety in the store or area around it
   - ☐ None of the above. I am able to get fruits and vegetables whenever I want.
3. How often do you smoke cigarettes?
   - ☐ Every day
   - ☐ A few days a week
   - ☐ Never

SAMPLE DEMOGRAPHIC QUESTIONS

If you want to analyze the data based on the demographics of the respondent, you can ask **optional** questions about their demographics. These are a few examples.

1. What is your age?
   - ☐ <18 year olds
   - ☐ 18–25 years
   - ☐ 26–35 years
   - ☐ 36–45 years
   - ☐ 46–55 years
   - ☐ 56–65 years
   - ☐ 66–75 years
   - ☐ 76 or older

2. What is your gender? *Check all that apply.*

- ☐ Male
- ☐ Female
- ☐ Transgender Male
- ☐ Transgender Female

WRAP UP SCRIPT:

"Thank you so much for taking the time to complete this survey!"

Photovoice Toolkit

The photovoice toolkit is to guide you in planning, developing and conducting a photo voice project and by no means the best and only way to going about it. Feel free to use all or parts of it with your CAM teams or just a guideline for Project Coordinators. Here's what's in the tool kit:

1. **Photovoice Methods Outline and Tips**
2. **Photovoice Checklist**: Action items to complete within a suggested time frame
3. **Protocol**: Questions to answer to help with recruitment, figuring out logistics, and creating session agendas

Photovoice Project Methodology Outline

1. Decide on theme or overall research question to guide participants in identifying photo subjects.
2. Recruit participants from target community to be trained and participate in photovoice project. Participants should expect to have a 1–2 month commitment to the project.
3. **Session 1, Photo Voice Participant Intro and Training**: Train Photovoice participants on:
    - Photovoice methods, project themes and deadlines
    - Photography overview, tips and practice
    - Photography safety and ethics
4. **Photography:** Participants take photos for 1–2 weeks, and send photos back to project to organize, print or display
5. **Session 2, Contextualizing Photos:** participants meet to present and contextualize photos using SHOWed method and write captions for selected photos

6. **Session 3, Photovoice Activity Planning:** Participants plan and discuss an activity (ex. gallery showing, press release, etc.) to display photos, tell their stories, and raise awareness about their issue
7. **Implement Activity** with participants to engage public, policy makers, stakeholders on issue

SESSION 1 TIPS:

- Talk about how Photovoice is a means to share their stories through photos and words about an issue.
- Though there may be a guiding research question, ask participants to come up with a few more related guiding questions to help them in taking photos.
- Provide a photography 101 session and have participants practice taking photos.
- Talk about safety and ethics of taking photos in public.
- Provide clear instructions on how to turn in photos to your team.

SESSION 2 TIPS:

- To display photos for discussion, print or project photos
- Have participants discuss their experience with taking photos
- The *SHOWeD* method helps guide discussion on the photos and what it means to the person who took the photo and the whole group
    - What do you See here?
    - What is really Happening here?
    - How does this relate to Our lives?
    - Why does this situation, concern or strength exist?
    - What can we DO about it?
- Have youth develop captions for selected photos based on the SHOWed discussion

SESSION 3 TIPS:

- Discuss any themes that have occurred from discussion of photos
- Discuss existing policies, stakeholders, and other related information on this issue
- Brainstorm activities that participants can engage in to advocate and tell their story

USEFUL RESOURCES FOR MORE IDEAS AND TIPS:

- http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/photovoice/main
- https://www.yumpu.com/en/www.theinnovationcenter.org_photo

Photovoice Checklist

This timeline is a *suggested* timeframe. Depending on who your population is, it is possible to do it in less time. Don't let the long time frame scare you. Photovoice is a powerful tool to use if it can be done!

Phase	Time	Activity
Planning Phase	Week 1–2	• Identify and recruit partnering organization or school • Identify times and dates for 3 sessions of meeting with recruitments • Draft and develop photovoice protocol and training materials • Gather cameras or identify how participants will take photo
	Week 3–4	• Submit draft protocol and training materials to Funded Agency or others for feedback • Recruit participants by emailing, calling or word of mouth; asked for a RSVP (either directly or through partner organization) • Figured out incentive (gift cards, food, etc.) for participants
	Week 5–6	• Finalize photovoice group protocol, tool and language • Identify facilitator/ trainer for photovoice project introduction and training • Practice photovoice training and introduction with team • Gather supplies for photovoice Participant Introduction & training • Confirm training time, location, and RSVPs with partner organization or school
Session 1	Week 7	• Complete first training session with participants and debrief training with team
	Week 8–9	• Follow up with participants on progress and photo submission • Practice and finalize the Session 2 Meeting: Contextualization of Photos; identify roles and agenda etc. • Gather materials needed: poster paper, markers, projectors, printed photos etc.
Session 2	Week 10	• Complete Session 2 with participant • Debrief with team and identify next steps for Session 3 • Practice and finalize the Session 3 Meeting • Gather materials needed for Session 3: poster paper, markers, printed photos
Session 3	Week 11–13	• Complete Session 3 • Debrief Session 3 meeting with team identify next steps for completing the Activity • Contact and follow up with photovoice participants on participating in the Activity
Activity	Week 14–?	• Begin planning and completing your activity

Photovoice Protocol

Overarching Research Question(s)/ Themes for Photovoice project

What is the story that you are trying to capture through the photovoice project? What do you want to learn about from the participants and their experience in their community?

TARGET SAMPLE

- **Describe your target population**
  Where do they live? What age range? What gender? What community do they represent?
- **Rationale for target population**
  Why did you decide to target this population? How does your community issue relate or affect them? What kind of unique experience or perspective do they bring?

RECRUITMENT STRATEGY

You will usually recruit participants through partner organizations, such as schools, community based organizations, etc., that have existing groups or can gather people for you. Photovoice projects usually have 8–12 participants that are committed to 1–2 months.

How will you reach the people you want to participate in the Photovoice Project?

Partner Group	Location	Total # to recruit *	Contact Peron

What would you say to convince someone or a partner organization to participate in a Photovoice project?

- What are you doing? What is the purpose of the photo voice project? How would it benefit the person or the partner?

PHOTOGRAPHY AND CAMERAS

- What equipment will participants use to take photos?
- What are the guidelines you will give participants in taking photos?
- How will participants learn how to take high quality photos?

Our CAM Project Survey

TEAM: ____

1. What does your team want to learn through your survey?

2. What are 2–3 examples of the survey questions you will be asking?

3. Who will you be surveying?

4. How many surveys do you want to complete?

5. Where will you be conducting your survey?

6. When will you be conducting your survey?

Survey Monkey Training

Facilitators Guide

Learning Objectives:

- ECLs and PCs will learn how to create a survey on Survey Monkey for the CAM surveys to be distributed as a link or administered through iPads
- ECLs and PCs will learn how to use the reporting functions of Survey Monkey

Time	Activity	Facilitator
4:00–4:15	**Introductions/Icebreaker**	
4:15–4:20	**Introduce Online Survey Training**	
4:20–4:40	**CAM Surveys Purpose Share out:** Each CAM group will share about their surveys • What do you want to learn through your survey? • What are some questions your team will be asking? • Who will you be surveying? • Where will you conducting your surveys? • When will you be conducting the surveys?	ECLs break out into their two CAM groups and discuss the answers to the Q and fill out the "Our CAM Project Survey" worksheet.
4:40-4:50	**Survey Monkey: Take a Practice Survey** (https://www.surveymonkey.com/r/CAM-PETS) • What did you notice about the survey? • What did you like about it? • What were some issues or problems with the survey that you would change?	Everyone fill out the survey using the Ipads. Discuss and chart out +/Δ including: • Wrong format • Lack of logic
4:50-5:10	**Survey Monkey: How to create the Survey** • Introduction • Types of Answer Options • Require Question • Move Questions • Create Link • Multiple Responses for a Device	Pass out the paper survey of the Pets Survey and tip sheet and show how to create survey: Paid feature would include logic, customization etc. (show them an upgraded version of the survey)

Time	Activity	Facilitator
5:10–5:40	**Survey Monkey: Practice Inputting a Survey** • Pairs will work together to create a practice survey into Survey Monkey and send link out to everyone • PCs and Staff will help trouble shoot	Pass out Practice Survey 2: Snack survey and work in pairs to create a survey monkey
5:30–5:40	**Survey Monkey Analysis!** Demonstrate data summary function	Show how analysis can be done on Survey Monkey
5:40–5:50	**Questions?** • What other Questions do you have? • What did you learn from this workshop? • What was good about the workshop? What could have made this workshop better?	
5:50–6:00	**CAM Groups Specific Close Out and Housing Keeping**	

Survey Monkey Training

Learning Objectives:

- ECLs and PCs will learn how to create a survey on Survey Monkey for the CAM surveys to be distributed as a link or administered through iPads
- ECLs and PCs will learn how to use the reporting functions of Survey Monkey

Time	Activity	Facilitator
	Introductions/Icebreaker	
	Introduce Online Survey Training	
	CAM Surveys Purpose Share out: Each CAM group will share about their surveys • What do you want to learn through your survey? • What are some questions your team will be asking? • Who will you be surveying? • Where will you conducting your surveys?	
	Survey Monkey- Take a Practice Survey (https://www.surveymonkey.com/r/CAM-PETS) • What did you notice about the survey? • What did you like about it? • What were some issues or problems with the survey?	

Time	Activity	Facilitator
	Survey Monkey: How to create the Survey • Customization • Introduction • Types of Answer Options • Require Question • Link • Multiple Responses for a Device	
	Survey Monkey: Practice Inputting a Survey, SNACKS survey • Pairs will work together to create a practice survey into Survey Monkey and create a link • PCs and Staff will help trouble shoot	
	Survey Monkey: Analysis! Demonstrate data summary function	
	Reflect & Evaluate • What other Questions do you have? • What did you learn from this workshop? • What was good about the workshop? What could have made this workshop better?	
	CAM Groups Specific Close Out and Housing Keeping	

The CAM Pets Survey

Practice Survey 1

We are part of the Tobacco-Free Project and wanted to know more about pet ownership and preferences among the Community Action Model teams.
The survey is only 8 questions long and will only take 5 minutes. Your answers will be anonymous and confidential.

1. **What CAM group are you part of?**
   - ☐ Bay Area Community Resources
   - ☐ BreatheCA
   - ☐ Booker T Washington
   - ☐ Jamestown Community Center
   - ☐ Rafiki Coalition on Health and Wellness
   - ☐ Samoan Community Development Center
   - ☐ Vietnamese Youth Development Center
   - ☐ Youth Leadership Institute
   - ☐ YMCA - Urban Services

2. **Having a pet can benefit your health**
   - ☐ Strongly Disagree
   - ☐ Disagree
   - ☐ Neutral
   - ☐ Agree
   - ☐ Strongly Agree

3. **Which pet do you prefer to own the most?**

- ☐ Cat
- ☐ Dog
- ☐ Hamster
- ☐ Goldfish
- ☐ Turtle
- ☐ Jaguar
- ☐ Tortoise
- ☐ Unicorn
- ☐ Porg
- ☐ Sea Otter

- ☐ Other:________________________________

4. **Do you currently own a pet?**

- ☐ Yes
- ☐ No

5. **If yes to Question 4, what kind of pet(s) do you have?**

Check all that apply.

- ☐ Cat
- ☐ Dog
- ☐ Hamster
- ☐ Goldfish
- ☐ Turtle
- ☐ Jaguar

- ☐ Tortoise
- ☐ Unicorns
- ☐ Porg
- ☐ Sea Otter

6. **If yes to Question 4, how many pets do you have?**
   - ☐ 1
   - ☐ 2
   - ☐ 3+

Optional:

7. **What age are you?**
   - ☐ Under 14
   - ☐ 14–17
   - ☐ 18–21
   - ☐ 21 and over

8. **What race/ethnicity do you identify with?**
   - ☐ African American/Black
   - ☐ Asian
   - ☐ Caucasian
   - ☐ Hispanic/Latino
   - ☐ Native American
   - ☐ Pacific Islander
   - ☐ Multiracial

   - ☐ Other: ______________________________

Thank you for completing this survey.

The Snack Survey

Practice Survey 2

We are part of the Tobacco-Free Project and wanted to know more about snacking and snack preferences among the Community Action Model teams.

We define snacks as a small portion of food eaten between meals.

We define a **HEALTHY snack** as a snack that is low in added fat and sugar and calories, such as fruits and vegetables, whole grain toasts or crackers, low-fat or fat-free cheese, nuts and seeds, and low salt unbuttered popcorn.

The survey is only 9 questions long and will only take 5 minutes. Your answers will be anonymous and confidential.

1. **How many times do you snack in a day?**
   - ☐ Never
   - ☐ 1–2 times a day
   - ☐ - 4 times a day
   - ☐ + times a day

2. **I like eating healthy snacks.**
   - ☐ Strong Disagree
   - ☐ Disagree
   - ☐ Neutral
   - ☐ Agree
   - ☐ Strongly Agree

3. **Does your CAM project offer snacks during your workshops, trainings or meetings?**
   - ☐ Yes
   - ☐ No
   - ☐ Sometimes

4. **How would you rate the snacks offered at your CAM project meetings?**
   ★ *= poor* ★★ *= okay* ★★★ *= great*
   - ☐ ★
   - ☐ ★★
   - ☐ ★★★
   - ☐ My CAM Project doesn't offer snacks

5. **Which healthy snacks would you want to eat during CAM trainings?** *Check all that apply*
   - ☐ Apples
   - ☐ Oranges
   - ☐ Bananas
   - ☐ Grapes
   - ☐ Mixed Nuts
   - ☐ Granola
   - ☐ Fruit and Nut Bars
   - ☐ Unsalted, unbuttered popcorn
   - ☐ String Cheese
   - ☐ Greek Yogurt with Fruits

continued...

- ☐ Hummus with Whole Wheat Pita
- ☐ Seaweed snacks
- ☐ Other:________________________________

6. **What other thoughts or opinions do you have about having snacks at trainings?**

7. **What CAM group are you part of?**
   - ☐ Area Community Resources
   - ☐ BreatheCA
   - ☐ Booker T Washington
   - ☐ Jamestown Community Center
   - ☐ Rafiki Coalition on Health and Wellness
   - ☐ Samoan Community Development Center
   - ☐ Vietnamese Youth Development Center
   - ☐ Youth Leadership Institute
   - ☐ YMCA – Urban Services

8. **What age are you?** *optional*
   - ☐ Under 14
   - ☐ 14–17
   - ☐ 18–21
   - ☐ 21 and over

9. **What race/ethnicity do you identify with? (Optional)**

☐ African American/Black

☐ Asian

☐ Caucasian

☐ Hispanic/Latino

☐ Native American

☐ Pacific Islander

☐ Multiracial

☐ Other: ________________________________

Thank you for completing this survey.

Train-the-Trainers
Survey Development Training

Learning Objectives

1. Participants will be able to identify good survey design, both in terms of individual questions and overall layout.
2. Participants will leave with activities and practices they can use to coach their ECLs through good survey design.
3. Participants will have the opportunity to reflect on their ECLs' survey implementation strategy, identify potential barriers to success, and consider appropriate problem-solving techniques.

Facilitator's Agenda

Time	Content	Resources
	1. Introductions 2. Icebreaker: Think about surveys you've taken in the past few months. What made these surveys effective?	• Flip charts, • Markers
	1. Present Good Survey Questions Checklist to participants; go through examples. 2. Ask Participants if they have anything to add. 3. Brainstorm: where can participants find examples of good surveys?	Good Survey Questions Checklist

Time	Content	Resources
	Coaching Tools for the Survey Development Cycle 1. Ideate Questions • Brainstorm as many questions as possible 2. Edit/Iterate Questions • Have ECLs fill out surveys with random answers. Do the data address your research questions? • Have ECLs conduct their surveys with a friend or family member. Are there any barriers to understanding? 3. Reduce Number of Questions • Decide collectively on an absolute maximum number of survey questions (10 or less) • Provide the good survey questions checklist as a decision-making tool for ECLs to vote on different questions • Eliminate redundant questions that collect the same information • Once questions are ordered, vote on the most important questions to put at the front 4. Survey • Write a script for ECLs to follow • Have ECLs role-play administering the survey with one another 5. Record and Track Data • Varies by method of administration	Sample survey with randomly generated data to practice “stress-testing” questions
	Discussion: Facilitators will discuss the following questions with participants: • How do your ECLS plan to administer your survey? • Who is your target audience and how are you planning to reach them? • What skills do your ECLs need to successfully conduct surveys with your target audience? • How are you planning to record or track the data you collect?	n/a

Issue: Healthy Retail

Sample Questions:

1. What gender do you identify as?
   - ☐ Male
   - ☐ Female
   - ☐ Transgender Male
   - ☐ Transgender Female

2. Do you live near of a corner store?
   - ☐ Yes
   - ☐ No

3. How often do buy snacks from corner stores?
   - ☐ Never
   - ☐ Once a week
   - ☐ 2–4 times a week
   - ☐ 5+ times a week

4. Are healthy snack options available at the corner stores you go to? (For this survey healthy snacks include non-processed food such as fruit, vegetables, and unsweetened beverages).
   - ☐ Yes
   - ☐ No

5. Do you like to eat fruits and vegetables?
   - ☐ Yes
   - ☐ No
   - ☐ Sometimes

6. Have you ever bought a healthy snack from a corner store?
   - ☐ Yes
   - ☐ No

7. Do you buy snacks from corner stores?
   - ☐ Yes
   - ☐ No

8. How frequently do you buy healthy snack options from corner stores?
   - ☐ Never
   - ☐ Once in while
   - ☐ Frequently
   - ☐ Everyday

9. Do you think people do not buy healthy snacks from corner stores because they are too expensive?
   - ☐ Yes
   - ☐ No

10. What is your age?
    - ☐ <18 years old
    - ☐ 18–25 years
    - ☐ 26–35 years
    - ☐ 36–45 years
    - ☐ 46–55 years
    - ☐ 56–65 years
    - ☐ 66–75 years
    - ☐ 76 or older

11. What is your ethnicity?
    - ☐ African American/Black
    - ☐ Asian
    - ☐ Caucasian
    - ☐ Hispanic/Latino
    - ☐ Native American
    - ☐ Pacific Islander
    - ☐ Multiracial
    - ☐ Other

50 people completed the above survey. Here are the results.

1. What gender do you identify as?
    - Male: 14%
    - Female: 6%
    - Transgender Male: 1%
    - Transgender Female: 0%
    - No response: 79%

2. Do you live near of a corner store?
    - Yes: 94%
    - No: 6%

3. How often do buy snacks from corner stores?
    - Never: 66%
    - Once a week: 22%
    - 2–4 times a week: 12%
    - 5+ times a week

4. Are healthy snack options available at the corner stores you go to? (For this survey healthy snacks include non-processed food such as fruit, vegetables, and unsweetened beverages).
    - Yes: 58%
    - No: 42%

5. Do you like to eat fruits and vegetables?
    - Yes: 36%
    - No: 20%
    - Sometimes: 44%

6. Have you ever bought a healthy snack from a corner store?
   - Yes: 46%
   - No: 54%

7. Do you buy snacks from corner stores?
   - Yes: 56%
   - No: 4%

8. How frequently do you buy healthy snack options from corner stores?
   - Never: 36%
   - Once in while: 44%
   - Frequently: 18%
   - Everyday: 2%

9. Do you think people do not buy healthy snacks from corner stores because they are too expensive?
   - Yes: 62%
   - No: 38%

10. What is your age?
    - <18 years old: 80%
    - 18–25 years: 18%
    - 26–35 years: 2%
    - 36–45 years: 0%
    - 46–55 years: 0%
    - 56–65 years: 0%
    - 66–75 years: 0%
    - 76 or older: 0%

11. What is your ethnicity?
    - African American/Black: 22%
    - Asian: 26%
    - Caucasian: 16%
    - Hispanic/Latino: 24%
    - Native American: 0%
    - Pacific Islander: 6%
    - Multiracial: 2%
    - Other: 4%

Survey Development Framework

The following five-step process can help you coach your ECLs in developing their survey.

Step 1. Ideate Questions

- Using research questions as a guide, decide on 2–3 key things you want to learn
- Brainstorm as many questions as possible

Step 2. Edit/Iterate Questions

- Have ECLs conduct their surveys with a friend or family member: Are there any barriers to understanding?
- Have ECLs fill out surveys with random answers: Do the data address your research questions?

Step 3. Reduce Number of Questions

- Decide collectively on an absolute maximum number of questions (10 or less)
- Provide the good survey questions checklist as a decision-making tool for ECLs to vote on different questions
- Eliminate redundant questions that collect the same information
- Once questions are chosen, vote on the most important questions to put at the front
- Use an audience lens. What information does your ultimate audience need to know to inform their decision

Step 4. Implement Survey

- Write a script for ECLs to follow
- Have ECLs role-play administering the survey with one another; Act out possible scenarios (ex. someone leaving a survey early or not speaking the same language)
- Prepare ECLs for rejection

Step 5. Record and Track Data

- Aim for 200 responses. Adjust based on geographic range of target population
- Adjust strategy as you collect responses to ensure you cover all of the demographic or regional groups you wanted to survey
- Regardless of administration method, it's a best practice to enter all data into an online survey tool (Survey Monkey, Survey Gizmo, Google Forms); often makes analysis much easier

Public Opinion Survey Questions & Criteria Checklist

A **public opinion survey** is an effective tool for informing your community diagnosis. Public opinion surveys are commonly used to assess a community's attitudes, beliefs, preferences, or priorities on a specific issue that might affect them.

Individual Questions

- ☐ One question per question
  - *Example of two questions in a question: Do you think smoking is bad for kids and tobacco shouldn't be sold near schools?*
- ☐ Keep questions closed-choice
  - Multiple choice
  - Yes/No
  - Likert Scale (Strongly disagree, disagree, neutral, agree, strongly agree)
- ☐ No leading questions. The question should not suggest an answer.
  - *Example: Do you think tobacco harms our community because it's unhealthy?*
- ☐ Avoid questions that require respondent to recall a specific time or amount.
  - *Example: In the last six months how frequently did you see advertisements for flavored tobacco products: none, 1–5 times, 6–10 times, more than 10 times*
- ☐ Do not ask questions collecting personally identifying information. (address, last name)
- ☐ Define jargon. Would someone with no knowledge of CAM understand the question?

Overall Survey Design

- [ ] Start your survey with a brief (2 sentence) description explaining its purpose.
- [ ] Keep it short, aim for no more than 10 questions. If you need to reduce the number of questions, consider the following:
    - Is the question directly related to the issue/problem/concept?
    - Is the question specific and clear?
    - Does the question provide answers to what you are trying to understand?
    - Does the question use language/jargon that is easily understood?
    - Are several questions asking the same thing?
- [ ] Place your most important questions at the beginning of the survey. (The first three questions should be the most important to your issue/focus area.)
- [ ] Place sensitive questions and demographic questions near the end of the survey.
- [ ] Make demographic questions optional.
- [ ] If doing administration online (ex. link to a survey), always ask for zip code.
- [ ] If surveying linguistically diverse populations, develop translated versions of survey.

Community Diagnosis Training

Learning Objectives

1. Provide ECLs information about how to ask research questions that frame their community diagnosis, and options for selecting research methodologies that can answer those questions
2. Get ECLs excited about research and data, and the role that it plays in leading policy-systems-environmental change

Facilitator's Agenda

Time	Content	Resources
	• Sign-in, mingling • Start earlier if everyone is ready to go. • 2-Option Survey Activity (Justice League vs. Avengers — passive data collection during mingling)	• Food • Sign-in sheet • Name tags • 2 options for collecting votes with tokens to vote (popsicle sticks)
	• Icebreaker (Names) • Kickoff; Brief Intro to Step 2 Community Diagnosis; Purpose of today's training; how today's training will help them complete the Community Diagnosis Tool due 11/30	• PPT Slides 2–3 • Projector/Laptop
	• Introductions & agenda review • Obama Altgeld Anecdote + Roleplaying conversation • Question for the group: What did you notice that was different about what the two ECLs had to say? How did the two phone calls feel different?	• PPT Slides 4–9 • Agenda on flip chart • Role play scripts
	• Diagnosis 101 presentation on Developing Strong Research Questions and Target Audiences	• Slides 10–13
	• Tally Survey responses from opening activity	

Time	Content	Resources

	Small Group Activity: Develop Research Questions
	• Go to the side of the room with your org's name and CAM Focus Area.
	• Individual writing: Spend 3–4 minutes writing out ideas for research questions on large post-its. ONE research question per post- it.
	• When alarm rings, crumple up each of your post-its and throw it at the basket in the middle of the room.
	• BRG /TFP facilitators will manage the following steps:
	    • Pass the bucket around and ask ECLs to each read one question.
	    • Facilitator groups the questions together by key themes.
	    • When ECLs are done reading all of the questions, facilitator goes through each group of post-its with ECLs and asks them to pick their favorite research question or come up with summarizing research question(s), and facilitator charts summary ?s.
	    • Ask ECLs what the target audience is for each question. (Optional)
	• Report out (10 min)
		• Slide 14
		• Post-its
		• Markers
		• Phone Alarm
		• Three baskets/bowls

	Research Activities For each activity, pair share who ECLs might use this method with and why they would use that method; Equity sticks to facilitate participation	• Slides 15– 21 • Equity sticks
	Research Method Activity For each question asked, ECLs move to the method they feel is most appropriate for a given question; facilitator shares out why	• Slides 22–26 • 5 Flip charts (one for each research method) set up around the room
	Evaluation surveys and close-out	• Slides 27–28 • Evaluation surveys

Diagnosis Training Role Play

PHONE CALL #1:

Hello City Council Member,

I wanted to bring your attention to an issue that has been bothering the Altgeld Gardens community. We have reason to believe that there is asbestos in some of the housing units. Asbestos is a lung health hazard and we don't want our neighbors, friends, and family to have to live with it. We need to know whether or not there is Asbestos in our housing units. I want you to get the city council to approve and pay for asbestos testing in Altgeld Gardens. Will you do this?

PHONE CALL #2:

Hello City Council Member,

I wanted to bring your attention to an issue that has been bothering the Altgeld Gardens community. We have reason to believe that there is asbestos in some of the housing units.

I have spoken with the residents of the Altgeld Gardens and of the 2,000 residents living here:

- 75% agree that asbestos testing is necessary
- 35 people have already called government officials to advocate for asbestos testing without any response
- 45% reported that they or one of their family members had respiratory issues, like lung cancer or mesothelioma. This proportion is much higher than that of the average population, which could be due to asbestos exposure.

Asbestos is a lung health hazard and we don't want our neighbors, friends, and family to have to live with it. We need to know whether or not there is Asbestos in our housing units. I want you to get the city council to approve and pay for asbestos testing in Altgeld Gardens. Will you do this?

Focus Group Development Training

Learning Objectives

1. Participants will learn how to develop a protocol for conducting focus groups
2. Participants will learn how to recruit participants for their focus groups
3. Participants will learn how to facilitate focus groups

Facilitator’s Agenda

Time	Responsible	Content	Resources
		• Introductions • Icebreaker*:* Finish the Sentence	

		• Define “focus groups” and why they are useful.
		• **Facilitated Activity:** Research purpose: Why did your team want to do a focus group? Who do you want to have participate in the focus groups (ex. target population or audience)? What are you hoping to learn from the focus groups? What questions do you want answered?
		  • Chart and group key themes, interests, or questions that ECLs raise.
		  • If possible, translate those into questions that could be the beginning of their focus group protocol.
		• Provide big-picture concept of what a focus group protocol should look like. (ex. the types of questions that you want to ask in a focus group)
		• Pass out Focus Group Tips handout and give the participants a minute to review it
		• Q&A
			• Focus Groups Tips handout
			• Flip chart
			• Markers

Time	Responsible	Content	Resources

		• Recruitment and Project Management
		• Scheduling and Logistics
		• Outreach Approach Tips:
		  • Recruit more than you need.
		  • Ask people to RSVP.
		  • Send reminders.
		• Soft Skills
		• Q&A
			• Flip Chart
			• Markers

		Facilitation Skills and Tips (AJJ) • Define roles (facilitator and note-taker) and the key skills/activities of both. • Begin with reiterating purpose of why this FG discussion is taking place and how findings will be used. • Ice-breaker: Build rapport with discussants. • Develop "community agreements". • Respect, one person speaks at a time, safe space, confidential, step up/step back, etc. • Soft Skills • Use artifacts as a tool to ease comfort levels • Debrief with other ECLs immediately after the focus group. What stood out? (Helps develop findings)	
		• Activity: Mock Focus Group and Discussion • Assign participants role to play as FG discussants. • Q&A	• Activity guide • Index cards with different roles for the mock FG

Step 3: Analyze and Disseminate Results of Community Diagnosis

Step 3 Terms

- **Key Findings:** Findings from community-led research in Step 2 that are most important, or salient, to the ECLs. Key Findings tend shed light on the impact the issue has on their community, the multi-level factors that contribute to it, and community recommendations or support on solutions.
- **Quantitative Research:** Research that gathers numerical and measurable data gathered through surveys, pools, etc. and conducts statistical or numerical analysis of the data.
- **Qualitative Research:** Research that observes and gathers non-numerical, such as words, images, maps, and diagrams, to gain deeper understanding, insight to a problem. Data is typically gathered through focus groups, interviews, photovoice, community mapping and other methods.

Step Overview

Analyze Results of Community Diagnosis

In Step Three, CAM teams analyze, identify and share 5 Key Findings from the data they collected and research they reviewed during Step 2: Community Diagnosis. These **Key Findings** shed light their chosen issue: the multi-level factors that contribute to it, the impact it has on the community, and community members' opinions on potential Policy-System-Environmental change solutions. Their selected Key Findings lay the foundation for chosen Action, defined in the CAM as Policy-System-Environmental change outcome. The Key Findings are also integral to the educational materials developed to support the Action, such as fact sheets and presentations, in the next Step: Select and Implement Action. Therefore, the CAM team's analysis of the Step 2 data is critical to moving forward towards creating change.

Skills Learned:

- Qualitative Data Analysis
- Generating and analyzing summary reports from online survey platforms
- Developing Key Findings & messages
- Creating tables, graphs & other visuals
- Structuring presentations
- Presenting in front of large groups
- Event planning & coordination
- Project & time management
- Teamwork

As with Step Two, it is important for Funding Agencies to set expectations and standards around community-led research and analysis. CAM projects are not expected to conduct research and complete statistical analysis that can be publishable in an academic journal. Instead the purpose of Step 2 and 3 is to identify 5 key findings that are the rationale for their proposed Policy-System-Environmental change. Their audience isn't academics or scientists but community members, stakeholders and decision-makers. The power of their research and findings is in its community-led and Community-Based process.

During Step 3, Emerging Community Leaders, and most Project Coordinators, begin to learn the basics of how to analyze their primary research, visualize, and present their data. San Francisco Tobacco-Free Project developed a series of train-the-trainer workshops for Project Coordinators to support their team's analysis of both quantitative and qualitative research to arrive at key findings. Additional trainings on visualizing and messaging can be provided to help teams think about creative ways to display their findings, such as using social math examples, creating charts and graphs. They also learn how to talk about their findings to other community members.

For surveys and other forms of **quantitative data** research, we recommend that teams utilize the analysis functions of t online platforms, such as Google Forms or Survey Monkey. No matter how data is collected, often on pencil-and-paper clipboard surveys, entering that data into an online platform will help the team to develop reports. Most of the statistical analysis that teams will be conducting consists of simple descriptive analysis and will not require complicated statistical analysis and software. The benefit of utilizing these online platforms is that they can generate colorful graphs and charts along with data tables, and even drill down or analyze comparisons by demographics. CAM teams can then examine these generated summary reports, develop statements on the findings from each data point, and then identify the most compelling findings.

Qualitative research using focus groups, key informant interviews, or stories from Photovoice pictures tend to be the most difficult for CAM projects. Unfortunately, there is no short-cut for qualitative research methods such as using online platform analysis software exists. As such, we recommend projects make meaning of their findings by doing a “content analysis.” A content analysis involves teams re-reading their notes and transcripts and then identifying key themes and quotes together. A fun analysis activity can be created by using different color highlighters, post-it notes, and chart paper. The San Francisco Tobacco-Free Project developed a workshop series to guide teams in this exercise that can be adapted for other CAM projects. Most importantly, Funding Agencies should emphasize that in qualitative analysis, CAM teams are selecting stories and personal opinions of community members. We have all heard the power of storytelling, often qualitative data, when thoughtfully selected, can be more powerful than piles of charts and hard numbers for an audience of decision-makers.

Historically, in Step 3 CAM projects are given the guidance to identify 5 Key Findings out of the multitude of data points they gathered and analyzed. Teams can develop criteria to help them prioritize their top 5 Key Findings to, such as those that are most relevant to their own lived experience, the most shocking data points, stories that are likely to elicit an emotional response, or those that support their proposed Policy-System-Environmental change. It is also important for the Funding Agency to emphasize that all data should be kept and understood by ECLs because they may be requested in the future by stakeholders and community members in Step 4.

A critical part of the ECL skill building process involved taking quantitative and qualitative data that may appear rather boring and finding ways to present these in visually compelling formats such as pie/bar charts, photos, case studies, poster boards and using other venues. It is at this point in Step 3 that the Funding Agency, the PC and others train the ECLs to create visuals, presentations and reports.

Disseminate Results of Community Diagnosis

Recently, the SF Tobacco-Free Project also added an additional component of *Step 3: Disseminate Results of Community Diagnosis* in which CAM teams present their findings back to community members and at a "Showcase" event hosted by the Funding Agency.

Community Presentation

Community is CAM's first name. One way to respect and value the community members that shared their experience, thoughts and other data to the CAM team is to present these findings back to them in a community presentation. In this way, the CAM team can ensure the community sees the result of the surveys, observations, interviews and other data processes they undertook. During that presentation teams go further and elicit feedback from community members about whether the findings resonate with them. This is in direct contrast to traditional research that often fails to return to community with findings, doesn't confirm the finding's validity and doesn't collaboratively identify solutions. CAM builds in a feedback loop to ensure that community gets the first look at the data results, allowing for greater built trust and support between community and the Emerging Community Leaders.

The Funding Agency provides guidelines to help CAM teams to plan and present to their findings to community members. CAM projects then record any responses from community members in their end of year report.

CAM Step 3 Showcase

To celebrate and elevate the work of Community Action Model projects and teams, the Funding Agency can consider putting on an end-of-the -year event, the “Showcase,” in which each project presents their findings and suggested Actions. In each team, the Project Coordinator and all ECL’s are involved in designing and presenting their work at the event. Funding Agencies and CAM projects invite community members, stakeholders, academia, and even decision-makers to the event. Sometimes this can generate momentum for CAM projects for the next *Step 4: Select and Implement Action* and can motivate CAM projects to finish their analysis and presentations, even before their community presentation. Most importantly, Funding Agencies can honor the leadership of Project Coordinators and their Emerging Community Leaders at this event in a public way. In the past, we engaged local elected officials to issue certificates from their offices to honor the community leadership of the CAM participants.

Here are some recommendations for putting on a Showcase:

- Involve Project Coordinators in the planning and shaping of the Showcase, from the name of the event to the presentation style to the type of foods that will be offered.
- Consider different types of presentation styles beyond Powerpoints, such as poster boards and videos, to showcase the creativity of ECL teams.
- Encourage Project Coordinators to give all ECL team members this opportunity to practice their presentation skills.

- Make sure that the location is easily accessible for community members and stakeholders, by having the event in a well- known community space.
- Invite friends and family of CAM ECL teams! Utilize Eventbrite or another online platform to get RSVPs.
- Don’t forget the food, entertainment, certificates and prizes.

Time Frame

Months 9–12 out of 24

9	10	11	12
Complete Phase 2: Primary Research	Analyze Primary REsearch	CAM Showcase	(Community Presentation)
Analyze Primary Research	Step 3 Report-Primary Research	Community Presentation	Year 1 Report

Deliverables

- **Step 3 Diagnosis Analysis Report-Primary Research:** Project Coordinators summarize their key findings from the primary research and include all research tools, data, and other relevant materials. In addition, they outline their plan for putting on a community presentation as well as their presentation for the Showcase.
- **CAM Showcase:** Emerging Community Leaders develop and present their key findings at a Showcase event hosted by the Funding Agency.
- **Year 1 Final Report:** Project Coordinators provide reflective summary on their achievements in completing Steps 1–3 as well as building capacity of their Emerging Community Leaders. They also provide insight to ways the CAM program and improve in its trainings, support and technical assistance.
- **ECL Post Survey:** All ECLs are required to complete an exit survey that will assess their change in skills and knowledge relevant to Steps 1–3.

Trainings by Funding/Training Agency

For Project Coordinators:	For Emerging Community Leaders
1. Data Analysis Workshops: Qualitative & Quantitative* 2. Developing key messages (outside trainer)	Step 3- Developing key messages and visualizations (BRG)*

*denotes training curriculum or agenda included in this toolkit

Recommended Trainings for ECLs conducted by Project Coordinators

- Calculating descriptive statistics
- Creating graphs and tables
- Creating maps and other visual data
- Theme analysis for focus groups and key informant interviews
- Identifying and creating messages out of key findings*
- Using Social Math
- Infographic development
- Developing compelling data points and key messages

Step 3 Strategies:

1. **Develop a Guidebook to help PCs have a stronger sense of expectations of Step 3 Timelines.** The idea of analyzing and reporting data can seem overwhelming for Project Coordinators, especially along with the task of training and supporting their ECL teams to do so. Providing a guidebook that details expectations, timelines and steps for the next 4 months can provide guidance for Project Coordinators in planning their workshops and activities. The guidebook can also include templates to help them organize their qualitative data.
2. **Assess training and technical assistance needs from Project Coordinators on Data Analysis skills.** As with any step, it is important to meet each Project Coordinator and their team at their skill and comfort level for this Step. Some Project Coordinators may have more experience

and skills in this area, while others are brand new. Some may be able to easily generate summary reports off of Survey Monkey but totally lost in terms of what to do with qualitative data analysis. One-on-one meetings towards the end of Step 2 are perfect times to assess training and TA needs for Step 3, so that the Funding Agency team can better develop and coordinate trainings for their Project Coordinators and ECL teams.

3. **Time the Data Analysis Trainings so that it isn't too far in advance while Teams are still immersed conducting their data collection.** We suggest that you hold the Quantitative and Qualitative Data Analysis workshops sometime towards the end of March, or first month of Step 3, so that teams should be completely done with the data collection and the training maximizes its relevance. If it is too far in advance, then there will be a gap between when they learn the skills and adapt the trainings to their ECL teams. Ideally, Project Coordinators could bring in some of their data to use as examples in the trainings by the Funding Agencies.
4. **Share examples of compelling messages and visualization from previous CAM groups as models and to increase confidence of ECL teams**. Sometimes just showing that past CAM projects have completed this step can inspire and a boost confidence to PCs and their ECL teams. Knowing that others like them have developed infographics, maps, and photovoice galleries in the past make Step 3 activities more attainable for them. They can also get a better sense of what is considered a compelling Key Finding, to help them develop criteria for their own findings.
5. **Provide resources and technical assistance to each group in identifying, messaging and visualizing their Key Findings**. Providing a training on messaging and visualizing their key findings can strengthen ECL team's skills in this area. The trainings are most effective when ECL teams can bring their analyzed data with them or even samples of visualizations they have already developed. Having multiple teams in the trainings can

give ECL teams the opportunity to present Key Findings to one another and get feedback from their peers.

6. **Involve CAM Project Coordinators and Emerging Community Leaders in the planning of the CAM Showcase.** As mentioned, the Step 3 Showcase is most successful when developed in partnership with the CAM teams, especially with the lens of how to best celebrate the ECLs in completing 3 out of 5 Steps of the CAM. More practically, it is important to identify a day, time and location that is most accessible and allows for the maximum participation of all CAM projects. In the past, we have asked: ECLs to submit and vote on the name of the event, Project Coordinators to decide on food types and caterers, and both
PCs and ECLs weigh in on how they want to present their findings. CAM teams are also encouraged to invite their family, friends and other staff from their organization to come to the event.

Training Samples

Step Three is all about analyzing results from Step 2's community diagnosis. It is important to equip PCs and ECLs with the skills needed to make sense of their data and how they can communicate these results to the community.

The sample training agendas included in this section include the following:

1. **Bright Research Group's Messaging and Visualization Training**
2. **PC Qualitative Data Analysis Training**
   A train-the-trainer style training designed for PCs to learn about qualitative data analysis to support ECL teams.
3. **PC Quantitative Data Analysis Training**
   A train-the-trainer style training designed for PCs to learn about quantitative data analysis to support ECL teams.

Remember to use these samples as a guide to create your own trainings for your CAM participants. Tailor and customize!

Quantitative Data Analysis Training for Project Coordinators

Analyze and Disseminate Results of the Community Diagnosis

Learning Objectives:

- Develop a definition for “Research Finding” and “Key Research Finding”
- Know that “Key Summary Data Table “ is final product for quantitative data analysis, which will be turned in with Step 3 Report.
- Learn and experience tastes of the workshop examples to guide your ECL team in identifying key findings from your surveys
- Review and adapt workshop series for your ECL team

Time	Agenda Item	Facilitator Notes	Materials
11–11:20	**Welcome & CAM Partners Share Out** **CAM survey or observation progress share out:** 1. What is a “Share Worthy” question that got suggested for your team’s survey? 2. What is your team’s progress on your surveys?	• Start at 11:10 at the latest • Goal of workshop is to provide example workshop series in how to guide your team to develop research finding statements and identify 3–5 Key Research Findings for your survey or observation • Acknowledge that teams are just starting to work on collecting data, but this will help you plan for March • Invite CAM Partners to take 1–2 Minutes to share their response to the share out questions	Agenda

Time	Agenda Item	Facilitator Notes	Materials

11:20–11:40	**Intro to Quantitative Analysis, CAM Style!**
	1. CAM style for Quantitative Data Analysis- Overview & Tips
	2. End Product: Data Summary table
	3. Collective Definition & Criteria for Research Finding
		Provide Overview of Quantitative Research Steps & CAM- Style (5 Mins)
		• Review why surveys and quantitative research are important?
		  • People respond well to data and numbers
		  • Easy to make visual and charts, etc.
		• **TIP 1**: PC use survey monkey, google form and other software analysis features to create data summaries after all surveys are collected. PCs can then print the reports out and guide team to analyze the tables, charts or graphs to develop a data finding statement.
		• **TIP 2:** Since CAM surveys don't use rigorous data collection methods like random sampling, CAM data analysis isn't about finding statistical significance or doing fancy data comparisons and modeling. Your team's goal is to write key research findings that can be communicated to community members and decision- makers alike.
		
		Data Summary Table (5 mins):
		• Summary table is the end product of summarizing and organizing your research findings; however your team will want to display the findings at presentations in a more compelling visual way. Please include demographic findings.
		• This is what you will turn in as part of your step 3 report as proof of data collection and analysis.
		
		Introduce Workshop Series (5 Mins)
		• Provide overview of 3 Workshops, 1.5–2 hour each that build upon each other
		• Adapt it to fit your team's needs:
		  • Can break into shorter mini-sessions to mix it up or combine workshops for larger session.
		  • Workshop 2 can be broken into two one hour workshops
		  • Change the type of activities based on what your team enjoys or works best for your team
		• Now we will walk through each workshop briefly, use the Workshop Series Facilitation guide.
			• Step 3 Quantitative Research Tip Sheet
			• Chart paper: Research Finding Definition
			• Chart Paper: Criteria for Research Finding
			• Post-it notes for research finding definition

Time	Agenda Item	Facilitator Notes	Materials

11:40–12:40	**Quantitative Workshop Series:**
	
	Workshop 1: Research Findings
	• Define research finding
	• Create criteria for a research finding
	• Write a research finding statement for one question
	
	TIP: If your team has a hard time coming up with compelling statistics or research that they've heard use the example statistics as a print out to help them identify which statistic is more compelling and explain why to create your criteria
	
	TIP: Definition of Research Finding: Research findings are the facts found in the data your team collected that answer your team's original Research Questions
		Workshop 1: Research Finding (35 Minutes)
		Overview of workshop (5 Mins)
		• Review the goal of the workshop
		• Workshop is about 1.5 hours
		• Project Coordinator needs to prepare chart/graph print out of one of the survey/observation questions
		• Ask PCs to turn to the relevant page on the Tip Sheet
		
		Demonstrate the workshop: Definition and Criteria for Research Findings (30 Mins) FACILITATOR MODELS WORKSHOP BY ROLE-PLAYING AS A "PROJECT COORDINATOR"
		1. **Group Definition - Research Finding (15 mins):**
		• **Ask:** How would you define "Research Finding"? Instruct each ECL to write their individual definition on a post-it note
		• **Share out:** ECLs to share their definitions
		• **Summarize and Synthesize**: Based on collective sharing, write a summary definition of "Research Finding" on a chart paper and ask your team for agreement on the definition.
		2. **Group Criteria for a strong Research Finding Statement (15) mins**
		• **Pair Share:** ECLs to pair up and answer the following questions (**5 mins):**
		  • What is a compelling statistic that you have heard recently?
		  • What about the statistic made it stick out in your mind?
		• **Group Share out (5 mins):** ECLs share out their compelling statistic and reason why it stuck with them.
		
		Group Discussion (5 mins): Based on what your team heard, facilitate a discussion to develop 3–4 criteria to determine a strong Research Finding Statement or Statistic
		
		Example of Criteria:
		• Surprising or interesting
		• About a majority or minority of the responses
		• Comparison or Trend
		• Written in simple language
		• Uses whole numbers for percentages or fractions
		• Makes statistic relevant to people's lives or something easy to understand (Social Math)
			• Chart paper of Workshop Series overview
			
			Workshop 1
			• Previous definitions and criteria of research finding
			• Print out of one of the example survey question's charts/data
			• Post-it notes for research finding statements

Time	Agenda Item	Facilitator Notes	Materials
11:40–12:40	**Workshop 2:** Fun-analysis • Create 1–3 research finding statements for rest of the survey or observation questions **Workshop 3:** Key Findings • Define Key Research Finding • Consensus on identifying 3–5 key findings out of all the research findings	**Workshop 2: Fun-analysis (10 Mins)** • Review the goal of the workshop • Workshop can be broken into 2, one hour sessions or a longer 2 hour session. If you split into two sessions, end the first session after you complete the "Gallery Walk." • PC needs to prepare a print out of each survey question's chart/graph for ECLs to write research finding statements per question • Tip: Make it fun with music and music switches • Take 7 minutes to walk through the gallery walk, asking PCs to pair up and write a statement for one of the posters and then say "rotate". Don't actually have them move onto to the next survey question. • Explain part 3 of the Session. **Workshop 3: Key Findings (10 Minutes)** • Review the goal of the workshop • Point out that PC prepares poster charts that has the Survey question and key findings from previous workshop • Tip: Option of making this short or long, depending on whether you want ECLs to present their posters and identify which research findings they would consider "Key Research Findings" as a way to practice presentation skills • Take 5 minutes to explain to walk through the workshop steps, do not need to demonstrate. Highlight the optional portion where the PCs can leave out.	**Workshop 2** • Print out of 2–3 example survey question charts/data **Workshop 3:** • Chart paper that says "Key Research Finding Definition" • Dots for voting

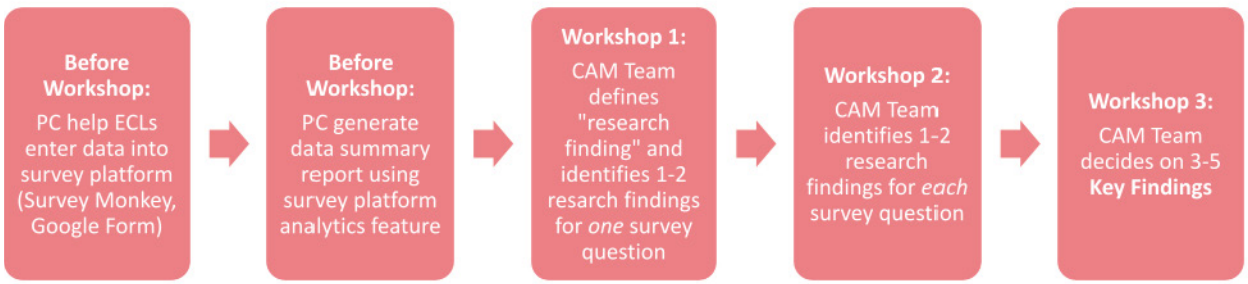
Time	Agenda Item	Facilitator Notes	Materials
12:40–12:50	**Group Discuss:** • What are some clarifying questions you may have for the workshop series? • What are ways you will adapt or utilize this series for your ECL team?	**Work Shop Series Wrap Up (10 minutes)** • Invite PCs to ask any questions they have about the workshop series • Invite PCs to share how they may adapt the series for their team discuss how they	
12:50–1:00	What are your over-all questions on Quantitative Analysis? Evaluation: Positives and Deltas	**Q& A Session (5–7 Mins)** **Workshop Evaluation (5 Mins)**	Chart Paper: +/Deltas

Quantitative Data Analysis Tip Sheet & Workshop Series for Project Coordinators

Overview

During Step 3: Analyze and Disseminate Community Diagnosis, CAM projects will analyze, interpret, and share data they collected during Step 2: Define, Design and Do Community Diagnosis. CAM projects are required to identify and report 3–5 Key Research Findings or messages per research activity as part of their Step 3 Report.

Recommended Process for Quantitative Data Analysis (one month):



Data Summary Table for Step 3 Report

Submit this table together with the CAM Step 3 Report to summarize your quantitative data.

1. Record your CAM team's 1–2 Research Findings per survey or observation question
2. Put an underline next to your team's 3–5 KEY findings
3. Attach your team's data summary report from Survey Monkey, Google form, Survey Analytics etc.

Data Summary Table for Step 3 Report

Survey or Observation Question #	1–2 Research Findings
Example: Have you ever smelled drifting cigarette smoke in your apartment?	1. *Two in 3 people living in public housing in the Mission have smelled drifting smoke in comparison to 1 in 10 living in market rate housing.* 2. *Two in 3 Mission residents in public housing have smelled drifting smoke in their home.*

Tips to Simplify Quantitative Data Analysis

Tip 1: Let Survey Monkey or Google Forms crunch the numbers for you!

For CAM projects that collected quantitative primary data through surveys and observations, we encourage Project Coordinators to utilize survey data collection programs such as Survey Monkey, Google Form, Survey Gizmo, and Survey Analytics, to collect, manage and analyze your data. These online programs can generate summary data reports and graphs, so that Project Coordinators and their CAM teams do not need to do it themselves using Excel.

If your team is using paper surveys, we recommend training 1–2 ECLs to help enter the data into an online survey program as extra credit, in order to limit data entry error. Project Coordinators should also check their data entry to make sure they are inputting it correctly. If your data is entered incorrectly than your research findings will not be accurate!

Tip 2: Get out of the rigorous data analysis and research mindset!

Quantitative data analysis CAM-style doesn't require rigorous data analysis, such as showing statistical significance, data modeling or creating multiple comparison tables to find compelling trends. The end goal of your team's data analysis is to communicate 3–5 key findings to community members and decision-makers; statistical significance will unlikely matter to them.

Tip 3: Remember, your team's data only represents the people you collected the data from.

Unless your team collected a large random sample of San Franciscans, you will not be able to say that your key findings apply to all San Franciscans. Instead, your team should specify who your team collected data from, such as neighborhood, age group, and ethnicity, by looking at the demographics data or based on recruitment/sampling method.

Example. If you conducted a survey of adults in the Sunnydale neighborhood:

- 2 in 5 of adult Sunnydale residents said that it was difficult to buy healthy foods, such as fresh fruits and vegetables, in their neighborhood.
- **NOT:** 2 in 5 of San Francisco residents said it was difficult to buy health foods, such as fresh fruits and vegetables, in their neighborhood.

Tip 4: Utilize and Adapt the CAM Quantitative Analysis Workshop Series!

The Tobacco-Free Project has developed a workshop series that features three (3), 1.5–2 hour workshops that a Project Coordinator can utilize and adapt to guide their CAM team through interpreting their generated Data Analysis Summary reports and generate 3–5 Key findings for each quantitative data primary data collection method. For implementation grants with multiple data collection methods, we recommend either combining workshops into a 2–3 hour chunk or mixing it up and switch between quantitative or qualitative analysis workshops.

Plan for at least 3 weeks, or 3 meetings with your ECLs, to complete the data analysis of your survey or observation data.

Workshop 1: Research Findings (1.5 Hours)	Workshop 2: Fun-Analysis! (2 Hours)	Workshop 3: Our 3-5 Key Research Findings (1-1.5 hours)
• Define "Research Finding" • Create criteria for a researchfinding • Write a research finding statement for one question	• Create 1-2 Research Finding statements for ALL survey or observation questions	• Define "Key Research Finding" • Determine which research findings are your team's 3-5 Key Research Findings

Quantitative Workshop Series Project Coordinator Guide

WORKSHOP 1: RESEARCH FINDINGS (1.5 hour)

Preparation: Print out the chart/graph and table for one of your survey questions. Make sure to have your own working definition of a research finding and criteria.

1. **Introduction (5 mins)**
   - Provide overview of the Step 3 quantitative data analysis process and the goal of creating 3–5 key findings to share to community members and decision-makers from the data they collected in Step 2.
   - **Share the Goal of today's workshop:** Collectively, write a research finding for one of the survey/observation questions.

2. **Group Definition- Research Finding (10 mins)**
   - **Ask:** How would you define "Research Finding"? Instruct each ECL to write their individual definition on a post-it note
   - **Share out:** ECLs to share their definitions
   - **Summarize and Synthesize**: Based on collective sharing, write a summary definition of "Research Finding" on a chart paper and ask your team for agreement on the definition.

TFP Definition of Research Finding: Research findings are the facts found in the data your team collected that answer your team's original Research Questions

3. **Group Criteria for a strong Research Finding Statement (20–25 mins)**
   - **Pair Share:** ECLs to pair up and answer the following questions **(10 mins):**
     - What is a compelling statistic that you have heard recently?
     - What about the statistic made it stick out in your mind?
   - **Group Share out (5 mins):** ECLs share out their compelling statistic and reason why it stuck with them.

- **Group Discussion (5–7 mins):** Based on what your team heard, facilitate a discussion to develop 3–4 criteria to determine a strong Research Finding Statement or Statistic.

Example of Criteria:

- Surprising or interesting
- About a majority or minority of the responses
- Comparison or Trend
- Written in simple language
- Uses whole numbers for percentages or fractions
- Makes the statistic relevant to people's lives or something easy to understand (Social Math)

Tip: If the ECLs have a hard time thinking about some statistics, print out the following example statistics and ask them to identify which of the two statistics was more compelling and the reason. Note that most of these statistics are made up!

Example Research Findings/ Statistics Written in Different ways	
9 in 10 smokers started smoking before age 18.	93% of smokers started smoking before age 18.
In 2017, 80% of the world's wealth goes to the top 1% richest people, while the 3.7 billion people who make up the world's poorest half did not gain any wealth.	82.3% of the world's wealth goes to the top 1% richest people
33% of people living in San Francisco HUD housing experienced drifting smoke in comparison to 16.3% of those who live in market housing	2x more people living in San Francisco HUD housing experience drifting smoke than those who live in market rate housing
None of the SRO residents in the Tenderloin ate more than 5 servings of fruits and vegetables per day, which is the recommended amount.	46% of SRO residents in the Tenderloin ate 4-5 servings of fruits and vegetables per date; 22% ate 2-3 servings; and 32% ate 1-2 servings.
Almost all of the residents stated that their top concern about the smoke-free policy was being evicted.	The top concern residents had about the smoke-free policy was eviction (95%), followed by fear of smoking outside due to community violence (46%).
San Francisco spends $300 million on health costs related to tobacco use every year, which is equivalent to 10,000 families' rent.	San Francisco spends $300 million on health costs related to tobacco use every year.

4. **Research Finding Statement for one Survey Question (30-35 mins)**
    - **Set up:** PC passes out the graph/chart and table for a survey question, such as the first survey question, to each ECL. Remind them of their collective definition and criteria of a research question. Put up a copy of the print out for everyone to see.
    - **Individual time (5 mins):** PC asks ECLs to take 5 mins on their own to write 1–2 research finding statement from what they see in the table or graph.
    - **Pair Share (10 mins):**
        - **Invite:** ECLs to pair up and share and compare their findings.
        - **Instruct:** ECLs to work together to come up with 1–2 research finding statements for the table or graph they are looking at.
    - **Share out & summarize (10 mins**).
        - **Invite:** All pairs share their post-it notes. Post it up under the survey chart.
        - **Synthesize and Summarize:** PC will note which ones are similar and which ones are different.
    - **Group Discussion: Finalize statement (10 mins)** PC reminds team of research statement criteria and helps team finalize 1–2 finding statements for the question.

5. **Wrap Up & Looking Ahead (2 mins)**

PC wraps up what the team learned about research findings and their final statement. Tells ECLs that during the next workshop they will write research findings for each survey question.

WORKSHOP 2: FUN-ANALYSIS (2 hours, or 2 one-hour sessions)

Project Coordinator prepares print outs of tables and graphs for each survey question. Tape each of the survey questions onto one large post-it paper each. Either post them around the room or place on different tables. To make this fun, consider putting on music and switch the song to indicate rotation.

1. **Introduction (5 mins):**

   Share the Goal of today's workshop: To develop research statements per survey/observation question.

   - Remind ECL team about the definition of a research finding & criteria.
   - Reviews through the statements and the process from Workshop 1/ Question 1.

2. **Gallery Walk – Individual Brainstorm (2–3 mins per question= 30 mins)**
   - **Invite:** ECL pairs or individuals spend 2–3 mins at each Question Post-It and write 1 finding statement on the Large Post-It paper.
   - Project Coordinator calls out rotate at the 3 minute mark; and ECLs go to next poster to write a new statement. If they can't come up with a new statement underline the statement that they agree with.
   - At the end, each ECL pair or individual should write or underline at least 1 statement on each poster. Each poster should have at least 2–4 statements.
   - Encourage the ECLs to think outside of the obvious findings.

3. **Review Statements & Report Out (60 mins):**
   - **(Smaller Group Option) Facilitate (30–45 mins):** Project Coordinator facilitates the group process demonstrated in Workshop 1 to discuss every question and identify the finding statements together as a group.
   - **(Larger Group Option) Pair Work (30–45 mins):**
     - Project Coordinator assigns posters with specific survey questions to ECL pairs or individuals, and reminds of finding statement criteria.

- ECLs review through the statements generated during the Gallery Walk, and create 1-2 research finding statements based on what was written. Most likely there will be similar finding statements.
- ECLs report out their final statements for each question, and invite the rest of the team to provide agreement and/or feedback.

4. **Wrap Up & Looking Ahead:** The team now has 1–2 research finding statements per survey question. The Project Coordinator lets the team know that in the next workshop they will decide which of these statements will be their final 3-5 KEY FINDINGS.

Note: Now your team has created the majority of the Data Summary Table. The Project Coordinator can begin that

WORKSHOP 3: OUR KEY FINDINGS (45 Minutes or 1.5 Hours)

Project Coordinator prepares one poster chart per survey question and with its 1–2 research findings from previous workshop.

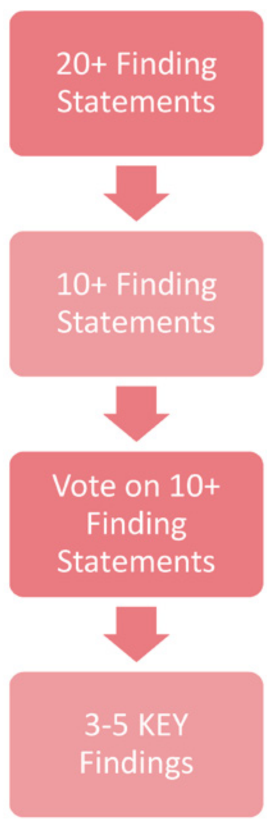
1. **Introduction** (5 mins):
   Share the Goal of today's workshop: To identify 3–5 KEY Research findings from all of the research findings the team has generated.
   - Point to all the research findings per question that are posted up.
   - Note: This process is similar to process in Workshop 1.

2. **Group Define - Key Research Finding** (10 mins): Facilitator asks ECLs to come up with their definition or criteria of a *Key* Finding.
   - **Ask:** We already defined what a good "finding statement" is, what do you think is a "KEY Research Finding?" Instruct each ECL to write their individual definition on a post-it note, same as they did in Workshop 1. It may be helpful to ask them what they think is the difference between a "KEY Research Finding" and a normal "Research Finding"

- **Invite:** ECLs to share their definitions of "Key Research Finding"
- **Summarize and Synthesize**: Based on group input, write the summary definition of "Key Research Finding" on a chart paper and ask your team for agreement on the definition.

> **Example Definition:**
>
> Key Research Finding answers the main research questions, and makes our issue important to a decision-maker or a community member.
>
> Key Research Findings often show how your issue affects a lot of people or how concerned community members are about it. It can highlight a difference, or an inequity between groups, or something that needs to be addressed.
>
> Key Research Findings should also show how much community support your solution may have.

3. **Consensus Building** (10 Mins or 45 Mins): Facilitator explains that now we want to collectively agree on 3 to 5 key findings by voting, but first we need to narrow down which research findings we think may fit the "Key Research Finding" definition that the group just came up with.
    - **Optional: Pair Think** (10 Mins): Invite each ECL individual or pair to look at the research findings for all of the questions (if you reviewed them collectively in Workshop 2) or for their assigned survey questions (from Workshop 2). Ask the ECLs to decide which 1–3 research



findings across the survey questions they would consider a "Key Research Finding."

- **Optional: Share Out** (20–30 Mins): Each ECL individual pair will get 5 mins to share which of their research findings they would consider a "Key Research Finding" to convince the group based on the definition of a Key Research Finding.
- **Voting** (5–7 Mins): Each ECL gets 3 stickers/ dots (or marks with a marker) to cast their vote. Ask the ECLs to mark which research findings they consider to be their "KEY Research Finding." Remind them that their votes should be based on the definition and criteria across all findings and research questions. PC should post up the research finding posters.

4. **Synthesize and Finalize** (10 mins)**:** PC reviews and shares out what research findings have the most dots. Project Coordinator then facilitates a conversation with their team to identify the final 3–5 Key Research Findings.
5. **Wrap Up** (5 Mins): Project Coordinator congratulates the team on finishing the data analysis portion of the Step 3! Next step is that they will attend a training with Bright Research Group to create messages and visualizations, such as charts and infographics, to be able to present their findings at the CAM Showcase and their community event.

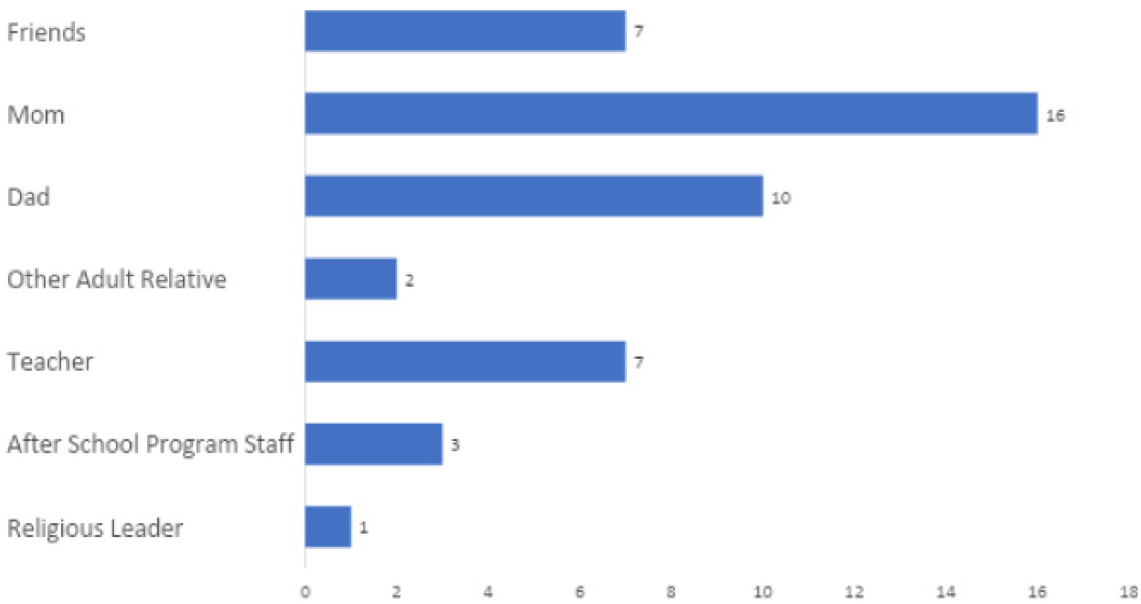
Note: Now your team has completed all the steps to finish the Data Summary Table! Just underline the research findings that your team has identified as KEY Research Findings.

Practice Data for Quantitative Workshop

When I need advice or support, I turn to the following people...

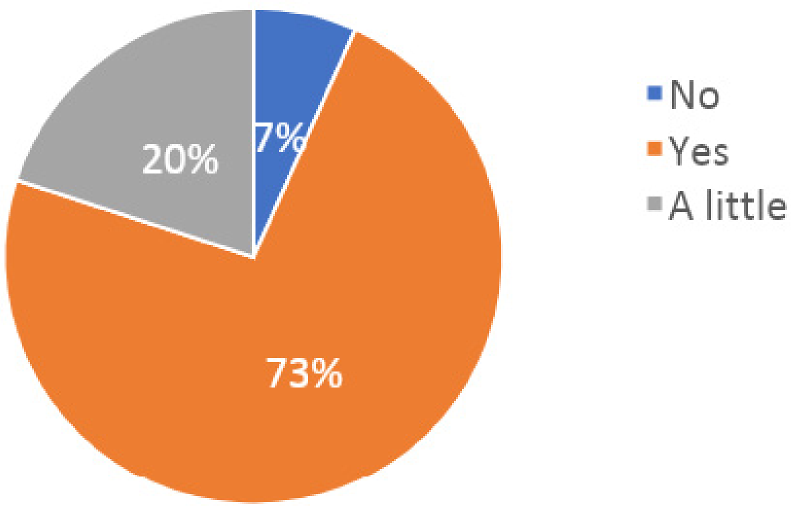
(Check all the apply)

17 responses



I am excited to have a run mentor.

15 responses



Quantitative Data Analysis Training Agenda

DATE: ____________________

LOCATION: ____________________

TIME: ____________________

Item	Time	Description	Facilitator
Introduction & CAM Partners Share Out	11:00–11:20	1. Review goal of workshop 2. Share-worthy memorable questions 3. Share Out • What is your org's progress on your surveys?	
Introduction to Quantitative Data Analysis, CAM Style!	11:20–11:40	1. CAM Style Quantitative Data Analysis Overview & Tips • Why surveys? Why numbers? 2. End Product: Data Summary Table 3. Collective Definition & Criteria for Research Findings	
Workshop Series Walk-through and	11:40–12:40	Quantitative Workshop Series 1. Workshop 1: Research Findings • Create research finding criteria • Create a finding for one survey question 2. Workshop 2: Fun-Analysis • Create findings for multiple questions 3. Workshop 3: Key Findings • Build consensus on identifying 3-5 overall findings	
Workshop Series Wrap Up	12:40–1:00	• Any questions about the workshop series? • Discuss: How to adapt the series for your own teams? • Any overall questions about quanti-tative analysis? • Evaluation (+/Deltas)	

Qualitative Data Analysis Tip Sheet & Workshop Series

For Project Coordinators

Overview

During Step 3: Analyze and Disseminate Community Diagnosis, CAM projects will analyze, interpret, and share data they collected during Step 2: Define, Design and Do Community Diagnosis. CAM projects are required to identify and report 3-5 Key Research Findings per research activity as part of their Step 3 Report.

Recommended Process for Qualitative Data Analysis

(6 weeks):

Pre-Workshop
Project Coordinator prepares Notes Table or Photovoice Photos + Narrative Plan

→

Workshop 1:
CAM Team identifies Themes for one quetsion or photo

→

Workshop 2 & 3:
CAM Team identifies themes for all questions or photos

→

Workshop 4:
CAM Team identifies 3-5 Key Research Findings & quotes

Pre-Workshop: Key Informant Interviews and Focus Group Notes

KEY INFORMANT 1: ____

Tell us about what you do and how does it relate to encouraging healthy retail stores?	How do you see improving the stores food environment as part of promoting healthy communities?	What are some challenges that you see in getting healthy, affordable food to low-income families in San Francisco?

Pre-Workshop: Key Informant Interviews and Focus Group Notes

KEY INFORMANT 2: ____

Tell us about what you do and how does it relate to encouraging healthy retail stores?	How do you see improving the stores food environment as part of promoting healthy communities?	What are some challenges that you see in getting healthy, affordable food to low-income families in San Francisco?

Pre-Workshop: Key Informant Interviews and Focus Group Notes

KEY INFORMANT 3: ____

Tell us about what you do and how does it relate to encouraging healthy retail stores?	How do you see improving the stores food environment as part of promoting healthy communities?	What are some challenges that you see in getting healthy, affordable food to low-income families in San Francisco?

Pre-Workshop: Photovoice

For Photovoice, the photos and the stories are the “data” that your team will be analyzing to identify themes. Prepare for the workshop series by:

- Making sure your team has chosen your 10–15 photos and narratives that best answer your research questions and/or resonate with your team about the issue.
- Print out each photo and narrative, attach them together and number them.

Themes Table for Step 3 Report

Submit the table on the next page to summarize your qualitative data as a part of the CAM Step 3 Report:

1. Record your CAM team’s 2–3 Main Themes per KII/FGD question
2. Underline your teams 3–5 Key Findings
3. Include the Key Quote for your 3–5 Key Findings
4. Attach your team’s notes for each of the interviews and focus groups

Question #	2–3 Themes	Key Quotes
Ex. Tell us about why you became small market owner in San Francisco.	1. *Immigrant family* 2. *Small family business* 3. *Store profits ensure family security and future success*	*"It's hard to make ends meet in the Bay Area, especially in San Francisco. We live in Vallejo where it's cheaper, but we still rely on the profits from three small markets in San Francisco and Oakland to pay rent, put food on our table, and make sure our kids get what they need to so they don't have to manage stores in the future, go to college and have better careers."*

Photovoice Theme Summary Table for Step 3 Report

Submit this table to summarize your Photovoice findings as a part of the CAM Step 3 Report

1. Record your CAM team's 2–3 themes per Photovoice photo and narrative
2. Underline your teams 3–5 KEY Findings
3. Include the Key Quote for your 3–5 Key Findings
4. Attach your team's final photos and narratives

Photo #, Title & Photographer	2–3 Themes	Key Quotes
Example: "My Sanctuary" by Ada Nester	1. *Home as sanctuary* 2. *Healthy home has no disturbances or intrusions**	*"After a hard day of work, I look forward to going home, my sanctuary, the only place where I feel safe and whole. And whenever my neighbors are fighting loudly or there is smoke, cigarette or pot — I don't know what it is, intruding into my home, I feel like my sanctuary is violated and it messes up my feeling of peace, my health, my goodness."*

Tips to Simplify Qualitative Data Analysis

Tip 1: Use an analogy to describe the Qualitative Data Analysis process
Such as summing up a movie or identify the key nuggets of someone's long-winded story to your question. Example. When your friend asks you to tell you what a movie is all about? Your are performing qualitative data analysis by summing up the moving in a few key points or themes, such as "it's a coming of age story where…" or "it's about a mother-daughter relationship.", etc.

Tip 2: Get out of the rigorous qualitative data analysis and research mindset!
Qualitative data analysis CAM-style doesn't require rigorous academic analysis, such creating a code book or using qualitative data software to code transcripts. The end goal is to communicate 3-5 key themes or nuggets and quotes about what your team found in the stories, interviews and photos to community members and decision-makers.

Tip 3: Remember, your team's data only represents the people you collected the data from.
Unless your team conducted a lot of interviews from a random sample of San Franciscans, you will not be able to say that findings from your interviews or focus groups apply to all San Franciscans. Instead, your team should specify who your team collected the information from, such as neighborhood, age group, and ethnicity, based on your team's recruitment/sampling method.

Tip 4: Use and Adapt the CAM Qualitative Analysis Workshop Series!
The Tobacco-Free Project has developed a workshop series that features four (4), 1.5–2 hour workshops that a Project Coordinator can utilize and adapt to guide their CAM team to generate 3–5 Key findings for your focus group, key informant interview or photovoice. For implementation grants with multiple data collection methods, we recommend either combining workshops into a 2–3 hour chunk or mixing it up and switch between quantitative or qualitative analysis workshops.

Alternatively, you can also have an “Analysis Retreat” that can be a half or full day to complete multiple workshops.

Plan for at least 4–6 weeks to complete the data analysis of your qualitative research data collection.

Qualitative Workshop Series

For Focus Group & KII: 4–6 Sessions:

Workshop 1a + 1b: What is a Theme? (1.5 - 2.5 hours)

- Define "Theme"
- Create collective criteria for "Theme"
- Identify themes for the first interview or focus gruop question across all interviews of focus groups

Workshop 2: Fun-Analysis! (2 hours)

- Generate themes for all interview or focus group discussion questions

Workshop 3: Main Themes (1.5 Hours)

- Identify 2-3 Main Themes per earch interview or FGD question

Workshops 4a + 4b: Our 3-5 Key Findings & Quotes

- Definte "Key Quote"
- Identify Key Quotes per each Main Theme
- Define "Key Finding" and criteria
- Identify 3-5 overarching Key Findings across all themes

For Photovoice: 4–5 Sessions :

Workshop 1a + 1b: What is a Theme? (1.5 - 2.5 hours)

- Define "Theme"
- Create collective criteria for "Theme"
- Identify themse for the first photo & narrative

Workshop 2: Fun-Analysis! (2 hours)

- Generate themes for all photos and narratives

Workshop 3: Main Themes (1.5 Hours)

- Identify 2-3 Main Themes per photo and narrative

Workshops 4a + 4b: Our 3-5 Key Findings & Quotes

- Definte "Key Quote"
- Identify Key Quotes per each Main Theme
- Define "Key Finding" and criteria
- Identify 3-5 overarching Key Findings across all themes

Qualitative Workshop Series Project Coordinator Guide

Workshop 1: What is a Theme? (1.5–2.5 Hours)

Project Coordinator Prep:

- **FGDs and KIIs:** Print out a Comparative Note Table for Question 1 of your Key Informant Interview or Focus Group Discussion.
- **Photovoice:** Print out the first photo and narrative

Timing of the Workshop:

For CAM projects that conduct Key Informant Interviews or Focus Group Discussion with more than 3 focus groups or key informant interviews , we recommend splitting this workshop into two parts if you have a short amount of time together OR make this a longer workshop than your usual time together.

Research Method	Part 1 Define Theme Create Collective Criteria for theme	Part 2 Identify themes for the first interview or focus group question or photo	Total Workshop Time
Photo Voice	45 minutes	30–40 Minutes	1.5 Hour
Key Informant Interviews	45 minutes	30 Minutes per KII (ex. 3 KIIs = 90 minutes)	1–2.5 Hours
Focus Group Discussions	45 minutes	30 Minutes per FGD (ex. 3 FGD = 90 Minutes)	1–2.5 Hours

Workshop One: Part One

1. **Introduction** (10 mins)
    - Provide overview of the Step 3 process and the goal of creating 3–5 key findings to share to community members and decision-makers from the data they collected in Step 2.

- **Share the Goal of today's workshop:** Collectively, create themes for the first key informant or focus group questions – or- photovoice photo and narrative.
- **Explain:** What is qualitative data analysis?
    - Provide an analogy that is relevant to ECLs to help explain qualitative data analysis
    - **Ex 1.** When your friend asks you to tell you what a movie is all about? You are doing qualitative data analysis by summing up the moving in a few key points or themes, such as "it's a coming of age story where…" or "it's about a mother-daughter relationship" etc.
    - **Ex 2.** When you ask your talkative friend "How was your weekend?" and she talks for 30 minutes explaining every little event or thing she did that weekend. And you came away with the main thing: She babysat her little sisters and did not get to do anything fun.
- **Qualitative Data analysis** is reading and reviewing all of the information/ stories/ responses provided by your key informant interviews/ focus groups/ Photovoice and narrowing it down to main themes.

2. **Group Definition- Theme** (10 mins):
    - **Ask:** How would you define "Theme"? Instruct each ECL to use 2–3 words to define "theme" on a post-it note
    - **Share out:** ECLs share their definitions
    - **Summarize and Synthesize**: Based on collective sharing, write a summary definition of "Theme" on a chart paper and ask your team for agreement on the definition.

TFP Definition of Theme:

Themes are the main idea or topic of someone's story, narrative or response.

3. **Group Criteria for a Theme** (20 – 25 Mins)
    - **Project Coordinator** should identify a famous movie that everyone knows. For example, Lion King or Star Wars movie. And ask, "How many of you have seen [MOVIE]? Let's pair up and share what themes we see in this movie?"
    - **Pair Share:** ECLs to pair up and answer the following questions (**10 mins):**
        - What are the themes in the [FAMOUS MOVIE]?
        - How did you know it was a theme?
    - **Group Share out (5 mins):** ECLs share out how they knew something was a "theme" of a story or movie
    - **Group Discussion (5-7 mins):** Based on what your team heard, facilitate a discussion to develop 2-3 criteria to determine whether main idea or topic is a theme

Example of Criteria:

- Topic or idea that repeated itself
- Pattern among the information
- Main lesson learned

Workshop 1: Part Two

4. Generate Themes for one KII or FGD question/Photovoice Photo + Narrative

Set up: PC passes out the "Notes Table" for one KII or FGD question OR Photovoice photo and narrative. Remind them of their collective definition and criteria of theme. Post up a copy of the print out taped onto a chart paper for everyone to see.

4A. Create Themes for the first KII (KII #1), responses to first FGD (FGD #1) question, or the first Photovoice photo & narrative (Photo #1) (PINK POST ITS)

- **Q1. KII #1, FGD #1, Photo #1 - Individual time (5 mins):** PC asks ECLs to take 5 mins on their own to write a phrase for each main idea or theme in the first KII's or FGD's response to question one –OR- photovoice narrative/photo. Come up with 2–3 main ideas or themes, write each one of the ideas on a separate PINK post-it note.
- **Q1. KII #1, FGD #1, Photo #1 - Pair Share** (10 mins):
    - **Invite** ECLs to pair up and share and compare the main ideas or themes on their notes
    - **Instruct** ECLs to work together to come up with a phrase (3–5 words) that combines some their similar themes and write it on a PINK post-it note. Each pair should still end up with several notes of combined themes.
- **Q1. KII #1, FGD #1, Photo #1 - Share out & Summarize** (10 mins):
    - **Invite:** All pairs share their PINK post-it notes. Post it up under a chart labeled "Question 1- KII [Name], "Question 1- FGD 1" or "Photo 1", depending on your research type.
    - **Synthesize and Summarize:** PC will note which ones are similar and which ones are different and group the PINK post-it notes together.
    - **Wrap Up and Next Step:** PC acknowledges that the team has created themes for this KII or FGD's response to Question 1 or for Photovoice photo and narrative 1.
    - **Note:** If you are doing KIIs or FGDs, PC explains they will do a similar but shorter process for the rest of the responses to Question 1.
    - **For Photovoice:** Go to the "Wrap Up"

4B. Create Themes for KII #2, FGD #2's Response to the same Question #1 (BLUE POST ITS)

NOTE: Since in Key Informant Interviews, and Focus Group Discussions the *same question* (Question #1) is asked of multiple individuals or focus groups, the next steps are not applicable to Photovoice data analysis. For Photovoice, skip to step 4C on the next page.

1. **Q1. KII/FGD #2 – Pair Share** (10 mins):
    - **Invite:** ECLs to pair up and review the notes for KII or FGD #2's response to Question 1
    - **Instruct:** ECLs to work together to come up with a phrase, or 3–5 words, that captures each main idea that they have and write it on a BLUE post-it note. Each pair should have 2–3 post-it notes of phrases or themes.
2. **Q1. KII/FGD #2 – Share out** (10 mins).
    - **Invite:** All pairs share their BLUE post-it notes. Post it up under a chart labeled "Question 1 - KII #2 [Name]", "Question 1- FGD 2" depending on your research type.
    - **Synthesize and Summarize (5 Mins):**
        - PC will note which ones are similar and which ones are different and group the BLUE POST-IT Notes Together
        - Then, PC will ask the team to help group the PINK and BLUE ones that are similar together.

** Repeat this process with different color post-it notes until each of the Key Informants or FGDs' response to Question 1 is complete**

4C. Wrap UP: Creating 2-3 Themes for Question 1 or Photo 1 (10 mins):

- **Group Analysis:** PC facilitates a discussion that invites ECLs to help finalize groupings of themes on post-it notes based on similarities.
    - PC should label each grouping with a phrase. We recommend using a phrase that many ECLs wrote to describe the theme. For themes that are not the same, make sure to acknowledge them and ask if these themes answer their KII/FGD or Photovoice question.
- PC then asks ECLs to vote on which of the themes are the most important 2–3 themes that answer their original KII/FGD or Photovoice question.

Post Workshop: PC should take a photo of the post-its, and write down the 2-3 themes for Q1 in the Theme Summary Table.

For KIIs and FGDs: PC prepares print outs of rest of the Comparative Notes Table per each questions left. Tape each KII or FGD Question's with each of the KII or FGD responses onto one large post-it paper each. If your Key Informant Interview Guide had 7 questions, you should have 6 large post-its. Either post them around the room or place on different tables.

For Photovoice: Post up the rest of the photovoice photos and narratives with a chart paper underneath.

To make this fun, consider putting on music and switch the song to indicate rotation.

Workshop 2: Fun-analysis

(1.5-2 Hours, depending on # of Questions or Photos)

1. **Introduction (5 mins): Share the Goal of today's workshop:** To develop themes for each KII, FGD or Photo narrative
    - Remind ECL team about the definition of a theme
    - Reviews through the theme groupings for FGD/KII Question 1 or Photovoice Photo/Narrative
2. **Gallery Walk to Generate Themes** (Time Pending # of Questions or Photos)
    3. **Key Informant Interviews/Focus Groups (15 Minutes per KII or FGD Question)**
        - **Invite:** ECL pairs or individuals spend 15 mins to review through response of all the KIIs or FGDs for their question. ECL pair or individual to:
            - **Write** 2–3 theme post-it notes and post it on the large Post-It Paper
            - **Underline** or highlight any part of the notes that stood out to them or they think is "quotable"

- **Rotate:** Project Coordinator asks the ECL pairs to rotate at the 15 minute mark; and ECLs go to next poster to post up 2–3 more themes and underline any quotable notes.
  - If the ECLs can't come up with a new themes then underline the existing themes they agree with that are already there.
- At the end, each KII or FGD question should have at least 5 themes.

4. **Photovoice** (10 minutes per Photovoice photo)
   - **Invite**: ECL pairs or individuals spend 10 mins to review through a Photovoice narrative and photo. ECL pair or individual will:
     - Write 1–2 theme post-it notes and post it on the large Post-It Paper
     - <u>Underline</u> or highlight any part of the narrative that stood out to them or they think is "quotable
   - **Rotate:** Project Coordinator calls out rotate at the 10 minute mark; and ECLs go to next Photovoice Narrative and Photo to write 1–2 more themes and underline any quotable parts of the narrative
     - If they can't come up with a new themes <u>underline</u> the themes they agree with.
   - At the end, each Photovoice Photo and Narrative should have at least 2–3 themes.
5. **Wrap Up & Looking Ahead:** PC states the team now generated themes for each of the questions or Photovoice photos/ narratives.

Post Workshop: PC should take a photo of the post-its, and write down the 2–3 themes for each of the questions or photos into the Theme Summary Tables.

Workshop 3: Main Themes (1.5 Hours)

Project Coordinator re-sets up the previous posters per KII/FGD question or Photovoice photo/narrative with all of the theme post-it notes, including the first question or Photovoice from the first workshop.

1. **Introduction** (5 mins): **Share the Goal of today's workshop:** To identify the 2-3 main themes for each of the questions from all of the research findings the team has generated.
2. **Group Define – Main Theme (20 mins):** Facilitator asks ECLs to come up with a criteria of a "Main Theme"
    - **Review:** Remind ECLs that you all generated many themes per question/Photovoice but not all of them are going to be our main themes or main findings per question. We want to identify 2–3 main themes per question/Photovoice.
    - **Ask (5 Mins):** What do you think our criteria should be for a "Main Theme?" Instruct each ECL to write at least one criteria on one a post-it note.
    - **Invite (10 Mins):** ECLs to share their criteria for a "Main Theme"
    - **Summarize and Synthesize (5 Mins)**: Based on collective sharing, write criteria for "Main Theme"

Main Theme Criteria Example:

- Answers our overarching research questions
- Repeats itself often
- Unique or surprising perspective
- Pattern among different type of respondents (ex. all of the people who smoke said X while nonsmokers said Y).

3. **Review Themes & Report Out** (60 mins)
    - **Pair Work** (30 mins): Project Coordinator assigns and divvy up posters of KII/FGD questions or Photovoice photos per ECL pair or individual.

ECL pair reviews through themes post-it notes per question or Photovoice photo and identifies which 2–3 themes they think are the "Main Themes" based on the criteria.

- **Report out** (20 mins): ECL Pair reports out their final themes for each question, and invites the rest of the team to provide agreement and/or feedback.

4. **Wrap Up & Looking Ahead** (10 Mins): Project Coordinator states the team now has 2–3 main themes per KII/FGD question or Photovoice photo and that in the next workshop the team will identify which of these statements are their 3–5 KEY FINDINGS.

Workshop 4: Key Findings and Quotes (2 hours)

Project Coordinator Setup: Post up each KII/FGD Question/Photovoice Photo and the 2-3 themes generated from Workshop 3.

If needed, we recommend splitting this workshop into two, one-hour chunks.

WORKSHOP 4: PART ONE, 3–5 KEY RESEARCH FINDINGS (1 Hour)

1. **Introduction** (5 mins)**: Share the Goal of today's workshop:** To identify key quotes for each main theme, and 3–5 KEY Research findings from all of the main themes.
2. **Group Define - Key Research Finding** (30 mins): Facilitator asks ECLs to come up with their definition or criteria of a key Finding.
    1. **Review**: Now we have 2–3 main themes from all of the photovoices/key informant interview/focus groups from the previous workshop. If someone asked you "Oh what did you learn from your FGD/KII/Photovoice project about your issue?" You probably do not want to share with them all of the main themes for all of the questions, instead you want to share with them the KEY RESEARCH FINDINGS.

2. **Ask** (5 Mins): What do you think is a "KEY Research Finding?" Instruct each ECL to write their individual definition on a post-it note. (5 Mins)
3. **Invite** (10 Mins): ECLs to share their definitions of "Key Research Finding"
4. **Summarize and Synthesize** (10–15 Mins): Based on collective sharing, write a summary definition of "Key Research Finding" on a chart paper and ask your team for agreement on the definition.

Example Definition: Key Research Finding answers the overarching research questions, and make our issue compelling or important to a decision-maker or a community member.

Key Research Findings often show how your issue affects a lot of people or a concern for a lot of community members; highlights an inequity between groups; or an aspect of your issue that needs to be addressed. Key Research Findings should also show the amount of support your solution may have.

3. Consensus Building (25 Mins): Facilitator explains now we want to collectively agree 3–5 Key Research by voting.

- **Voting (5–7 Mins):** Each ECL gets 3 dots to vote and place on which main themes are a "Key Research Finding" based on criteria across.
- **Synthesize and Finalize (10 mins):** PC reviews and shares out what main themes have the most dots. Project Coordinator then facilitates a conversation with their team to identify the final 3–5 Key Research Findings based on the criteria.

Qualitative Data Analysis Training for Project Coordinators

Analyze and Disseminate Results of the Community Diagnosis

Learning Objectives:

- Gain overall knowledge about qualitative data analysis, including identifying themes & key quotes, and creating a theme summary table
- Learn and experience a workshop example to support your ECL team in developing a final theme summary table for your qualitative research
- Review the workshop series and calendar when your team will complete the workshop activity

Time	Activity	Facilitator	Materials
3:00–3:20	**Introduction & CAM Partners Share Out** • What qualitative data collection they are using? • What’s unique and compelling about qualitative research and its findings in comparison to quantitative?	Start 10 minutes after start time, at the latest. **Introduction (5 Mins)** • Goal of Workshop: Provide example workshop series on how to guide your team to develop main themes and quotes for your qualitative data collection method and identify 3–5 Key Research Findings • Acknowledge that teams are just starting to work on collecting data, but this will help you plan for March • Frame qualitative research as taking a lot of information from people and identifying the “nugget” or “meat” of what was said. For example, when someone asked you what was the movie about, you don’t share every single thing that happened but provide general topics or main themes. We will be doing the same thing for qualitative data analysis. **Share Out (10 Mins)** Invite CAM Partners to take 1–2 Minutes to share their response to the share out questions	• Agenda • Chart Paper: Qualitative Research

Time	Activity	Facilitator	Materials

3:20–3:40	**Intro to Qualitative Data Analysis, CAM Style**
	1. CAM Style Qualitative Data Analysis Overview & Tips
	2. End Goal: Theme Data Summary Table
		Provide Overview of Qualitative Research Steps & CAM Style (10 Minutes)
		• Remind PCs that we are not doing “rigorous” qualitative data analysis, but creating a simplified way to arrive at key findings and themes to share with community members and decision-makers.
		• Qualitative data analysis is difficult and we want to make it as approachable and fun as possible for your ECLs
		• Provide overview of the Workshop Series, including pre-workshop. The workshops can be broken into 4–6 workshops if needed.
		• Show how PCs should set up the Notes Table to organize your research findings with the BreatheCA
		Introduce Theme Data Summary Table (5 mins)
		• Summary table is the end product of summarizing and organizing your research findings; however your team will want to display the findings at presentations in a more compelling visual way.
		• This is what you will turn in as part of your step 3 report as proof of data collection and analysis.
		• Explain the steps and difference for KII and Photovoice
		Introduce Workshop Series (5 Mins)
		• Provide overview of 4 Workshops, 1.5–2 hour each that build upon each other
		• Adapt it to fit your team’s needs:
		    • Can break into shorter mini-sessions to mix it up or combine workshops for larger session.
		    • Workshop 1 & 5 can be broken into two shorter workshops
		    • Change the type of activities based on what your team enjoys or works best for your team
		• Now we will walk through each workshop briefly, use the Workshop Series Facilitation guide.
			• Qualitative Tip Sheet & Workshop Series

Time	Activity	Facilitator	Materials
3:40–4:50	**Workshop 1:** (3:40–4:20) • **Part 1** What is a *Theme?* (3:40–4:00) • **Part 2**: Theme for Question or Photo 1 (4:00–4:20) **Workshop 2:** (4:20–4:30) Fun Analysis **Workshop 3:** (4:30–4:40) Main Themes **Workshop 4:** (4:40–4:50) Our 3–5 Key Findings & Quotes	**Workshop 1, Part 1** (3:40-4:00) **Overview (5 Minutes)** • Review the goals & timing, note that this can be broken into 2 parts, and that it really depends on the number of focus groups or KIIs your team completed • Project Coordinator preparation is note table for Question 1 of your KII or FGD –OR- Photovoice Photo + Narrative # 1 **Definition and Criteria for Theme** (15 Mins) • Introduction (2 Minutes) Analyzing your focus group/interview or photovoice involves reading and reviewing the responses and identifying “themes” **Group Definition Theme** (10 mins): • **Ask:** How would you define “Theme”? Instruct each PC to use 2–3 words to define “theme” on a post-it note • **Share out:** PCs share their definitions • **Summarize and Synthesize**: Based on collective sharing, write a summary definition of “Theme” on a chart paper and ask your team for agreement on the definition. **TFP Definition of Theme:** Themes are the main idea or topic of someone’s story, narrative or response. **Criteria of Theme** (5 Minutes): Walk through how PCs can help ECLs generate their criteria for themes. **Workshop 1, Part 2: Themes for Q1 or Photo 1** (20 Minutes) — (4:00–4:20) Facilitate creating themes for Question 1, KII or FGD 1 (Pink Post-Its) and explains how you could do it for KII2 or FGD 2 (Blue Post-its). Note photovoice projects only needs to do this process once.	• Workshop Series Print out • Post-it Notes • Example Notes from BREATHECA

Time	Activity	Facilitator	Materials
		Workshop 2: Fun-Analysis (10 Minutes) — (4:20–4:30) **Overview** (5 Minutes) • Review the goals & timing, note that the timing depends on the number of questions or photos your team has • Project Coordinator preparation is comparative note table for rest of the KII/FGD questions –OR- Photovoice Photo + Narratives • Explain the Gallery Walk Set up **Demonstration (5 Minutes)** Facilitate how ECLs will spend time at each of the papers and identify themes, and rotate to create 4–5 themes per question **Workshop 3: Main Themes** (10 Minutes)— (4:30–4:40) **Overview** (5 Minutes) • Review the goals & timing • Project Coordinator preparation is to reset up the gallery walk with all of the theme post-it notes generated from Workshop 2 **Walk through** (5 Minutes) • Walk through how team will develop a definition for “Main Theme”; PC will then assign KII/FGD questions or Photovoice Photos to ECL pairs or individuals to identify 2–3 main themes based on the various post-it themes; and report out. Team will respond with agreement or feedback • Now your Theme Table has 2–3 Main Themes per question or photovoice table has 2–3 Main themes per photo	

Time	Activity	Facilitator	Materials
		Workshop 4: Key Findings & Key Quotes (10 Minutes) (4:40–4:50) **Overview** (5 Minutes) • Review the goals & timing- can be broken into two workshops • Project Coordinator set up is the theme table created in workshop 3 **Walk Through** (5 Minutes) • Part 1: Walks through how team will develop working definition of Key research finding and vote on which main themes are their 3–5 Key research Finding • Part 2: Walks through how team will develop criteria for key quote and work in pairs to identify 1 Key Quote per Key Research Finding.	
4:50–5:00	Apply the training & Evaluation	**Work Shop Series Wrap Up** (5 Minutes) • Invite PCs to ask any questions they have about the workshop series • Invite PCs to share how they may adapt the series for their team discuss how they **Share +/Deltas on training** (5 Minutes)	

Example Notes Table

	Carol McGruder Interview 9/15/15 (African American Tobacco Control Leadership Council)	**Phil Gardner** Interview 10/2/15 (African American Tobacco Control Leadership Council)	**Tanya Bustamante** Interview 9/29/15 (Tobacco Director for City of Berkeley Public Health Dept.)
Question 1: **What prompted you to explore this topic?**	My aunt passed away from emphysema at 52 due to smoking and I was a former smoker myself. Also, the FDA's exemption of menthol and other flavors galvanized the no menthol movement and thus Saving Black Lives was formed in 2008 in response to the state cuts of tobacco research for ethnic community.	In 2008, I was made aware about legislations that would regulate tobacco products. I found out that the proposed legislation excluded menthol cigarettes. We created a campaign to include menthol cigarettes to be regulated and went back to testify in 2010. We've received support, however, legislators still haven't done anything and it's been six years. So that prompted us to take our work to the local level.	Back in 2010 the city council was looking at revising the zoning ordinance to ban tobacco products around certain facilities in Berkeley but that movement was delayed. It wasn't revived until 2014 when city council was looking to prohibit selling of flavored products and there was evidence of the impact of flavored product, particular menthol on smoking rates among youth. The current buffer ordinance includes menthol

	Carol McGruder Interview 9/15/15 (African American Tobacco Control Leadership Council)	**Phil Gardner** Interview 10/2/15 (African American Tobacco Control Leadership Council)	**Tanya Bustamante** Interview 9/29/15 (Tobacco Director for City of Berkeley Public Health Dept.)
Question 2: **Who have been your allies and opponents throughout your work?**	Allies: • San Francisco Public Health Department: Tobacco-Free Project • Chicago Health Department (buffer zone) • Truth Initiative • National African American Tobacco Prevention Network Opponents: Surprisingly, the California Tobacco Control Program took years to respond to our letters of concern. In the past they didn't research the trends that were taking place in our community and didn't respect the voices of our leadership. They saw it as a challenge when people are serving their own community along with funding and cuts. However, the relationship is changing for the better.	Allies: • Policy makers and city officials who support our resolution Opponents: • Convenient and gas store owners who sell tobacco products • Politicians who are influenced by tobacco companies	Allies: • Carol McGruder (Saving Black Lives) • Berkeley School District • Alameda County Health Department Opponents: • Retail store owners...they are organized. They've had a presence at other jurisdictions. They argue that their business will be impacted • Berkeley Chamber of Commerce because they care about retail so their concern was loss of revenue.
Question 3: **What do you think of the idea of SF ending the sale of all flavored tobacco products at any location with a tobacco retail license?**	I love it. It will finally end all the loopholes surrounding flavored tobacco control. More importantly, youth will feel less compelled to use those products. It will be a lot of work and when dealing with policy, you have to be willing to compromise.	I would completely support it. It'll definitely be a fight since you are going after ever store with a but it's not impossible.	Wow. That's ambitious. We at Berkeley are in complete support of that idea. Please contact at when you are in your advocacy phase so we can offer any necessary assistance.

Step 4

Select Action & Implement Activities

Terms

- **Policy-System-Environmental change (PSE):** Unlike traditional public health interventions, PSE change focuses on addressing social, political, environmental structures that influence health rather than individual knowledge or behavior.
  - Policy Change: Change to a written statement of organizational position, decision or course of action (example: local ordinance, state law, guidelines, mandates, etc.)
  - Systems Change: Changes in organizational procedures (example: ways resources or staff are used, programs available, etc.)
  - Environmental Change: Physical, observable changes in the built, economic or social environment (example: streets and bike lanes, partnerships, physical changes to stores or buildings).
- **Action:** The CAM term for a Policy-System-Environmental change solution that addresses the focus issue identified in Steps One to Step Three. An Action should be achievable, sustainable, and should compel a Decision-Maker or a stakeholder to modify the way things work for the wellbeing of the community.
- **Tactic:** The CAM term for an educational intervention that can lead up to and support an Action. These are generated through the planning process outlined in the Midwest Academy Strategy chart. Tactics are how you will use your power to compel your decision-maker. Tactics are sometimes also referred to as Activities.
- **Midwest Academy Strategy Chart:** A tool developed by the Midwest Academy to help campaigns analyze power and develop a strategy and plan to compel a decision-maker to create the change they want to see.

- **Educational Packet:** A packet of documents, such as fact sheets, position papers, data visualizations, reports, endorsement forms, etc. that can be used to educate stakeholders and decision-makers about the CAM project's issue and solution. The packet succinctly summarizes the campaign work but also demonstrates their power by showing the amount of support for the solution.
- **Stakeholder:** Someone or a group that is directly impacted, either positively/negatively, by the proposed Action OR has a role to play in the Action. They may hold influence and power over the change or those who can make the change, but not be the direct decision-maker.
- **Demonstration Project:** A short term project that shows stakeholders and decision-makers that a selected Action can address the focus health issue at a smaller scale. A Demonstration Project is one of the Tactics that may demonstrate feasibility of your Action.
- **Decision-Maker:** A key person who has the power to institute a change in Policy-Systems-Environment. This person is usually either in charge of a body or organization, an elected official, someone with control over funding allocation or a person who owns and can modify a resource, building, or location. Examples include an elected council member, the director of a budget committee, the owner of a business or Executive Director of a non-profit organization, the leader of a faith community, or some other person with institutional power.

Step Overview

Step Four, Select Action & Implement Activities, can be thought of as the community organizing or campaign phase of the Community Action Model. In Step 3, CAM projects analyzed and disseminated the data that they collected during their community diagnoses and identified key findings. In Step 4, they will be using those key findings to identify and implement an **Action** or a

Policy-System-Environmental (PSE) change solution to address their project issue. The goal of this step is to create lasting change within communities to improve health. Teams will be working on Step 4 throughout most of the second year of the CAM to build their base and their confidence to compel a key stakeholder or decision-maker to champion their proposed Action through various Tactics, or activities.

Step 4 is the longest step in the Community Action Model process, and its end goal is for a decision-maker to champion an Action. In a more organic, less prescriptive process, the time frame for Step 4 could be open-ended until this goal is achieved, or it is clear from decision-makers that the Action is not going to be adopted. Since most Funding Agencies have time-limited contracts and funding for Community-Based Organizations we recommend keeping giving a distinct time frame for Step 4, which then can be renegotiated based on the CBO's success. For the San Francisco Tobacco-Free Project (SFTFP), we limit Step 4 to the second year of the CAM.

We also recommend splitting Step 4 into distinct parts in order to guide the CAM Project Coordinators and Emerging Community Leaders through the process. In this Step 4 Guide, we broke Step 4 into five sequential parts:

1. Revisit Step 1-3	• **Trainng:** Step 4 Orientation for PC and ECLs • **Deliverables:** 6 Month Training Plan, ECL Pre-Surveys
2. Identify ACTION Based on Key Findings	• **Trainng:** PSE Workshop Series • **Deliverables:** 2-3 Action Ideas & Rationale
3. Develop an ACTION PLAN with Tactics	• **Trainng:** Midwest Academy Strategy Chart, Demonstration Project Workshop Series • **Deliverables:** Midwest Academy Strategy Chart, Initial Action Plan and Ideas, 6 Month Curriculum Plan
4. Implement ACTION PLAN to educate stakeholders & build power	• **Trainng:** Message Development, Media Advocacy, One-on-One Stakeholder Meetings • **Deliverables:** Stakeholder Engagement Plan, Media Plan, Demonstration Project Plan, Action Plan Progress Report
5. Compel Decision-maker to Champion Action*	• **Trainng:** Meeting with Decision-Makers • **Deliverables:** Check-ins on attempts to schedule meetings with Decision-Makers

*Do note that Emerging Community Leaders may strategize to compel and meet with their key decision-maker at any time during the implementation of the Action Plan. Their meeting with their target decision-maker does not always happen at the end of completing all of the other tactics, and sometimes will generate new tactics.

1) Revisit Step 1-3 in Step 4 (Month 13–15)

Training

- Step 4, Project Coordinator Orientation
- Step 4, Emerging Community Leaders Orientation

Deliverable:

- 6-month Training Plan
- Emerging Community Leader Pre-Surveys

Given inevitable transitions with ECLs at the half-way point of the CAM project, Funding Agencies should dedicate time at the beginning of Step 4 to reorient and train Project Coordinators, especially since projects are making a switch from community-led research in year 1 to community organizing in year 2. PCs may be recruiting to fill their team of 6-8 ECLs, as some may have left due to other priorities, graduation, jobs, and other internship opportunities. Project Coordinators can lean on the expertise of their continuing ECLs to onboard new members to their team, while honing their message development and presentation skills about their CAM topic for the upcoming activities in Step 4. Project Coordinators and ECLs should have a strong understanding of the issue and its importance to their community, their key findings from both primary and secondary research, and any initial ideas of an Action, or Policy-System-Environmental change solution.

Throughout this process, it is important to ground Project Coordinators and ECLs in the importance of community organizing and creating lasting change to improve public health. The orientation training kicks off Step 4, and in past CAM cycles, videos of inspiring and relevant social justice campaigns, and discussion on their experience or knowledge of civic engagement and campaigns were shown to enrich ECL understanding of the work they are about to embark on in Step 4.

2) Identify an Action or PSE Change (Month 16)

Training

- CAM PSE Workshop Series

Deliverable:

- 2–3 Action Ideas & Rationales

At the beginning of Step 4, CAM teams identify a few viable Actions based on their research, key findings and feedback from community presentations. The process of choosing an Action may be difficult for CAM Project Coordinators and their ECLs, especially if there is turn-over among the team — and may require additional support and guidance from staff. Teams may need to review through their findings from Step 2 secondary research on existing Policy-System-Environmental changes related to their issue or do additional research on existing best practices to brainstorm ideas. Once teams have generated a few ideas of Actions (PSE changes) they want to pursue, they should discuss them with their CAM Staff Lead from the Funding Agency to examine viability of each idea. CAM teams often default to choosing a policy Action, such as a city-wide ordinance, which may not be as achievable within the time frame or political context of the project. Funding Agencies can help projects to consider resolutions of support from different decision-making bodies, changes to how existing programs at a government agency are being implemented, or identifying decision-makers in other institutions, such as schools, health centers or housing authorities.

During this planning phase, CAM projects should consider what happens after they adopt a specific Action. The enforcement and monitoring strategies aligned with each potential Action will really inform the viability of that Action. Funding Agencies should point to the criteria that an Action should be sustainable and improve the health of communities beyond the term of their project.

3. Develop an Action Plan with Tactics (Month 17–18)

Skills Learned:

- Developing educational materials
- Developing and conducting a presentation
- Developing a campaign strategy
- Message development & framing
- Using social media and traditional media as a tactic
- Writing an opinion piece or letter to the editor

- Creating social media posts
- Educating and engaging stakeholders & decision-makers
- Identifying and understanding a government policy or decision-making process
- Drafting resolutions and model policies
- Project planning and implementation
- Community outreach
- Project and time management
- Team work

Training:
- Midwest Academy Strategy Chart Training

Deliverable:
- Midwest Academy Strategy Chart
- Initial Action Plans & Ideas
- Educational Packet
- Mid-Year Progress Report

Once an Action is decided upon, CAM projects will then develop an Action Plan or a campaign strategy with tactics that will ultimately compel a decision-maker to champion and adopt their Action. We train CAM Project Coordinators to utilize the **Midwest Academy Strategy Chart** (MASC) to facilitate a strategy planning session with their ECL team. Historically, this tool has been used by community leaders for organizing campaigns to identify allies, opponents, key Tactics and resources to successfully compel a primary target decision-maker on championing or supporting a policy change.

The CAM project team uses the Tactics they identified in the MASC session to develop an Action Plan to implement over 4 months. In an **Action Plan**, Tactics can be used in two different ways and build upon each other towards a final meeting with a decision-maker. **Tactics** are used to mobilize community members and stakeholders to support an Action through informing them about the issue and proposed solution (for example- presentations with community groups, media coverage, etc.). These types of Tactics build power and confidence through base-building. Other Tactics are used to directly compel or pressure decision-makers to champion and adopt an Action (Demonstration Projects, elevating the issue in the media, and visits with decision-makers). In developing an Action Plan, Tactics should be planned in a sequence so that they can build upon one another, or escalate in power, leading towards compelling the target Decision-Maker. See page 574–577 for a summary of Tactics.

Example of Escalating Tactics:

The Project Coordinator and their ECLs take at least 1.5 months to develop an Action Plan which outlines their proposed Tactics, as it takes a considerable amount of strategic thinking, planning, and identifying roles among the team. Funding Agencies should also help Project Coordinators set expectations for their team that these initial plans provide guidance to the direction of their Action, but they also have to be ready for potential changes based on feedback from stakeholders and other challenges that will emerge.

Before moving onto implementing their tactics, ECLs should design and develop their **Educational Packet.** Though it isn't technically a "Tactic" because it is an educational material, it is utilized to support campaign Tactics and should describe their project idea and demonstrate the power of community to affect change. An Educational Packet grows and changes as a CAM project progresses through Step 4. In addition to the foundational information that describes their team, their issue, key findings, the proposed Action and an endorsement form, the packet will eventually include an endorsement list, success stories from their Demonstration Project, media coverage or other materials that demonstrate the work of the project.

Role of Funding Agency

To provide guidelines to the Action Plan, Funding Agencies can either require a set number of Tactics or require specific types of Tactics. In the past, SF Tobacco-Free Project has used the first approach, but has now shifted to the second more prescriptive approach to simplify training provision, peer-learning among CBO partners, and to meet the capacity of our CBO partners. The former approach may prove just as successful, allowing ECLs more decision-making power on their strategy development, but may require more individualized support and accountability for each CAM project. Funding Agencies can also consider a step-wise planning approach with mini plans due for each Tactic while also encouraging teams to jump into completing their first tactics at earliest possibility. For some CAM teams juggling both planning and implementing activities has proven overwhelming, which meant they stayed in a "planning phase" for a longer period, leaving only 2 months for actually implementing their plan. The multiple deliverables for these mini-plans also proved to be stressful for some, while creating a larger plan with all the tactics was overwhelming for others. Ultimately, Funding Agencies need to consider meeting the needs of their CAM projects but also ensuring that a well-informed plan is developed to guide the team towards success in Step 4.

4) Implement Action Plan (Month 19–23)

Training

- Demonstration Project Workshop Series
- Project Planning and Management with Emerging Community Leaders
- Message Development
- Media Advocacy
- One-on-one Meetings with Stakeholders & Community Organizations

Deliverable:

- Demonstration Project Plan
- Stakeholder & Decision-Maker Meeting Plan
- Media Plan

Role of CAM Teams: PCs and ECLs

This is the most exciting part of Step 4! CAM teams put into motion the plans they developed in the previous months, flexing their community organizing skills. CAM teams often split their group into mini-teams or "Tactic teams" that are responsible for a specific Tactic, while the Project Coordinator and/or Lead ECL supports each team and overall project management. Given that ECLs' time with the project is limited, Project Coordinators or Lead ECLs often will be the main point of contact with stakeholders for meetings or setting up the Demonstration Project, asking that ECLs help draft emails or talking points for them to use. Ultimately, it is the ECLs who implement the Tactics of the Action Plan from developing vlogs, posting on social media, speaking to decision-makers and planning out and implementing their Demonstration Project.

There could be synergy and opportunities to collaborate between CAM projects if they are working on similar Actions. For example, groups working on the store retail environment strategized together to talk to a decision-maker about a package of policies. Or if two projects are working on the same Action, they can focus on different target decision-makers, resulting in implementing tactics that would build power and gain the support of two separate constituent bases, but ultimately leading to the same Action.

Read more about each Tactic on page 574–577, including a more detailed description of the Demonstration Project on page 574.

Demonstration Project Tactic

We have found that requiring a Demonstration Project, or a pilot project, as a Tactic helps teams show the viability of their proposed Action to stakeholders and create a tangible outcome, even if their Action is not ultimately achieved. The success of the Demonstration Project in building power and compelling a Decision-Maker depends on the selected Action. Actions that impact places, such as stores, streets or schools, can easily translate into a small-scale, time-limited Demonstration Project. For example, a CAM team's Demonstration Project could work with one corner store to take down unhealthy advertisements and replace them with health promotion advertisements on store fronts to show the viability of and support for a policy change in the Planning Department limiting storefront advertisement coverage. On the other hand, some policies may not lend well to a Demonstration Project and will require other tactics to build power. For example, it may not be feasible to try out a policy, such as capping the density of permits to sell alcohol or a tax on sugar sweetened beverages. If the Funding Agency chooses to require a Demonstration Project tactic, it should also provide some flexibility for Actions in which a Demonstration Project isn't feasible or impactful.

Funding Agencies should emphasize that the ECL-selected Action is their final goal, and that the Demonstration Project is only a Tactic and stepping stone to that goal. CAM teams that are approved to do a Demonstration Project, should include a summary report of the Demonstration Project that includes how they can build upon their Demonstration Project to achieve their final Action.

CAM projects can also leverage their media efforts, either social or traditional, to disseminate the story and impact of their Demonstration Project. Planning and hosting a press conference at the launch or end of the Demonstration Project can ensure that community members and Decision-Makers know about their success and their proposed Action. Facebook Live streams, Insta-stories and video blogging (vlogs) can help capture and share the story and progress of their Demonstration Project.

Adequate budget should be allocated for the Demonstration Project for any supplies, incentives, and other related costs. Projects may want to use some of the budget to incentivize or honor those who agreed to partner in the Demonstration Project, such as teachers, store owners, and others.

Role of Funding Agency

Funding Agencies can provide support and technical assistance by connecting CAM teams to stakeholders, help troubleshoot challenges, and provide trainings on specific Tactics. In the past SF TFP has provided trainings on utilizing social media for project outreach, how to conduct one-on-one meetings, planning meetings with decision-makers, giving public comment, and project management for CAM Project Coordinators. Trainings can be done on a case-by case basis or during monthly partner meetings for all CAM Project Coordinators.

During this step, Funding Agency staff need to provide customized technical assistance to their CAM projects based on their chosen Tactics and the capacity of their team. Some CAM Community-Based Organizations have more institutional experience in organizing and advocacy, providing deeper support to their Project Coordinators and ECL team on strategy. They may already have an established relationship with decision-making bodies or have experience approaching them on Policy-System-Environmental change and can help the ECL team with navigating complicated and nuanced systems and relationships. On the other hand, for some CBOs this is their first experience supporting a program that is focused on PSE change, and they may need more guidance from the Funding Agency in implementing their plan. We have found that providing more regular check-ins or being available for support throughout this step can help Project Coordinators better guide their team in implementing and adjusting their Action Plan.

Summary of Campaign Tactics & Skills Learned by ECLs

Tactic	Description	ECL Skills Developed	SF TFP Required
Community and Organization Endorsements **+ Educational Packet**	This Tactic can build your team's base and confidence by gaining endorsements from individuals and organizations to support the CAM team's Action, either through an online platform or written signatures. Often, this happens after a one-on-one meeting with the individual or organization. Ideally, the endorsers are constituents of the Decision-Maker. For example, for an elected official the residents in their district or for a principal of a school the teachers, parents and students. We encourage groups to complete at least 3 one-on-one meetings. Prior to conducting one-on-one meetings, CAM teams are required to develop an Educational Packet and endorsement form to summarize their key findings and describe their proposed Action. An endorsement form is also created for individuals and community organizations to formalize their support, and identify ways they want to participate in the Action Plan.	• Message Development • Presentation/ Public speaking • Outreach • Graphic Design • Persuasive writing	X
Demonstration Project	A Demonstration Project is a pilot project that shows the potential effectiveness and viability of an Action to a Decision-Maker. This tactic requires the CAM projects to engage and collaborate with different stakeholders to implement a small-scale, time-limited version their Action. Not all Actions are suited for a Demonstration Project as they could not be implemented on a small scale. Actions that are place-based, such as making a change at a school, a corner store, on a specific street, etc. are best suited for a Demonstration Project Tactic. Demonstration Projects allow for the CAM teams to have a tangible win and impact even if their Action is never achieved. To ensure that the Demonstration Project is seen and heard, Funding Agencies can also encourage a media activity to elevate their project. Lastly, CAM projects can also develop a summary report of their Demonstration Project that can be part of the Educational Packet that is shared with Decision-Makers and stakeholders.	• Project Planning & Management • Team-work • Outreach • Monitoring & Evaluation Report Writing • Media Engagement	X

Tactic	Description	ECL Skills Developed	SF TFP Required
Social Media	Increasingly, social media is used in public health and community organizing to educate a target audience, garner their support, and call them to action. Projects are encouraged to utilize their organizations existing social media presence or create their own to disseminate their key messages to their targeted audience, gain endorsements, and call others to action. CAM teams have utilized various types of social media platforms (Facebook, Instagram, Twitter, YouTube, etc.) and created a range of multi-media posts (Infographics, videos, Insta-stories, vlogging, photos, etc.). Youth and young adult Emerging Community Leaders are most adept and excited about the creativity and familiarity of this tactic. It is important to ground ECLs in the difference between utilizing social media personally and for media advocacy on behalf of a project and organization (professional representation versus personal opinion or brand). Teams often discuss what it means to represent an organization on social media or the role of Project Coordinators or other staff in vetting and approving posts.	• Media advocacy • Message development • Developing an editorial calendar Video creation • Graphic design	X

Tactic	Description	ECL Skills Developed	SF TFP Required
Stakeholder and Decision-Maker Meetings	Drawing from a list of opponents and supporters as well their secondary and primary targets developed from the MASC process, CAM project teams identify key stakeholders with whom they wish to discuss their proposed Action and Demonstration Project. We define stakeholders as those who are either (1) directly impacted by their Action, positively or negatively; (2) partly or wholly responsible for implementing their Action; or (3) a secondary target that can influence their primary Decision-Maker. We recommend that groups begin reaching out and meeting with their stakeholders sooner than later because these meetings may change the course and timing of the other Tactics. Stakeholders can provide feedback that will strengthen or steer the CAM projects' proposed Action or Demonstration Projects toward success. On the other hand, sometimes these meetings could lead to challenges for CAM projects, such as opposition or redirecting their whole Action and Demonstration Project idea. Either way, this process grounds the CAM project in the social and political reality of their proposed Action. The meeting with their primary Decision-Maker, such as an elected official or a director of a public agency, is often the most intimidating for CAM teams. The majority of teams reach out to their primary Decision-Maker toward the end of Step 4 when they have built a considerable amount of power through endorsements, their Demonstration Project, and elevating their issue in media.	• Outreach • Message Development • Persuasive communications • Presentation/ Public speaking	X
Traditional Media	Traditional media is still a powerful tactic for CAM projects to use, especially in reaching a larger audience and getting the attention of an elected official or decision-maker. Press conferences, letters to the editor, radio spots, and opinion pieces are traditional media strategies. Funding Agencies should provide adequate training and technical assistance on pitching and contacting media outlets for CAM projects to complete this tactic. Funding Agencies can also build in a budget for media contractors to support the media activity of CAM projects to put on a press conference or pitch stories to media outlets.	• Message development • Persuasive communications • Public speaking/ presentations	

Tactic	Description	ECL Skills Developed	SF TFP Required
Rallies or Marches	Rallies and marches are the most well-known campaign Tactics, because of their visibility and often coverage by the media and social media. This Tactic can demonstrate power by putting pressure on a specific Decision-Makers but also build power by gaining more visibility and support from others on an issue. CAM projects will have to distill their CAM project into succinct messages on the problem and their demand while inviting their endorsers and supports to participate in this call to action. Strategically, rallies are more effective when CAM projects have collected endorsements and built a strong base of supporters ready for action.	• Message development • Persuasive communications • Outreach • Event coordination and planning	
Phone or Letter Writing Campaign	Decision-Makers are held accountable by constituents, often those who voted them into power, and should care about their opinions. CAM projects can engage in a letter writing or phone banking Tactic by asking endorsers and other supports to directly communicate to the target Decision-Maker to urge them to adopt the proposed Action. This can be done the traditional way, pen to paper and mailed or through an online platform, like Change.com, which provides pre-written templates and automated emailing to decision-makers. This Tactic puts direct pressure on Decision-Makers because they are hearing the collective and individual voices of community members.	• Message development • Persuasive communications • Outreach	
Speaking at Public Hearings and meetings	If CAM projects are engaging in an Action that would be implemented by a government institution, providing comment or testimonials at public meetings is another way to build and demonstrate power. These public comments can happen when decisions are being made about whether the CAM Project's Action is adopted by a decision-maker and in the policy-making process or during general public comment time at public meetings. CAM projects can also mobilize their supports to engage collectively in this activity, as well as provide talking points and guidelines to their supporters to do so.	• Message Development • Persuasive communications • Presentation/ Public speaking	

5) Compel Decision-Maker and Achieve Action

Training

- Meeting with decision-makers

Through implementing their Action Plan Tactics, CAM teams build power, by generating support and building their confidence, to then compel their target Decision-Maker to adopt and implement their Action. Meetings with Decision-Makers can happen at the end of Step 4, but some teams may choose to engage their Decision-Maker earlier on to get their stance on the issue and proposed solution and to assess interest in the topic. During these meetings, CAM teams present their issue, key findings, Demonstration Project outline or results, endorsement list, and other key materials. Most importantly, the team asks for their Decision-Maker feedback and support on their Action. Sometimes, the response of the Decision-Maker leads to the team conducting more Tactic activities suggested by the Decision-Maker, such as engaging other key stakeholders for input, conducting more community-led research or even meeting with other Decision-Makers. The hope, of course, is that the Decision-Maker expresses support and commitment to take on the issue and begin the process to implement the change. The Decision-Maker may commit to proposing a policy at a government legislative body, such as city council or the board of education, or a system-change at a decision-making body like the directors of an agency or the administrators of a school, clinic, or community institution. Plans can be drawn up to change the built environment or commitments to new partnerships can be made between organizations.

For many ECLs this is the first meeting they ever have with a Decision-Maker, and just the experience of talking to an elected official, an agency leader, or other Decision-Maker builds their skills and confidence to utilize their power to create community change. Community leaders are more confident in using their power and voice to influence decision-makers and understand the strategy and process to do so. For some, especially young people, this experience encourages future participation in civic engagement and advocacy for other issues regardless of whether the Decision-Maker ultimately adopts their Action.

Role of CAM Team: PCs and ECLs

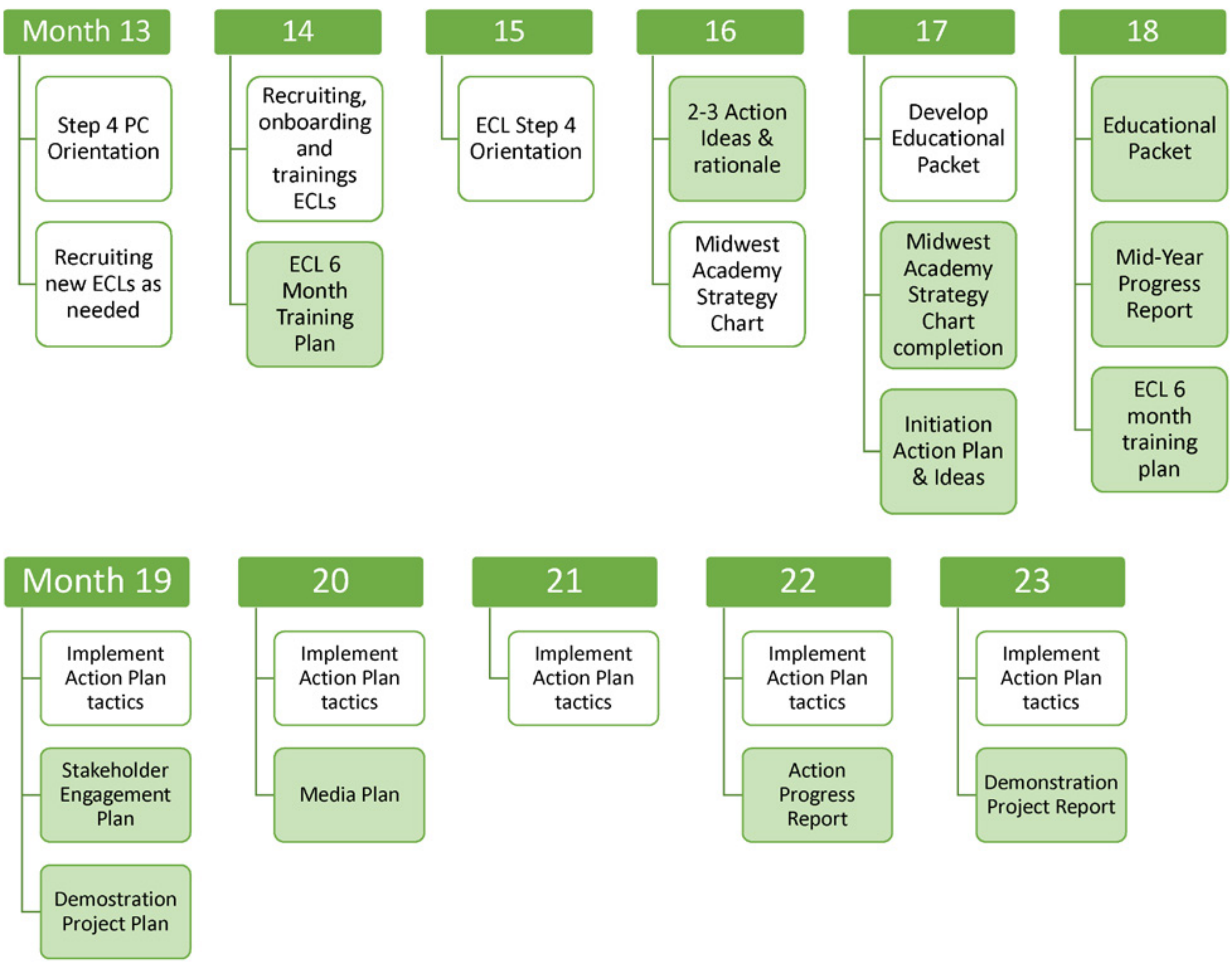
During this part of Step 4, ECL teams undergo preparation and planning for their meeting with the decision-maker. Project Coordinators or lead ECLs may make the initial contact to set up the meeting at least a month in advance. Then, the team spends workshop time identifying team roles in the meeting, and developing and practicing their meeting with the Decision-Maker. Teams develop an agenda, talking points, materials, and visuals for the meeting. They also identify difficult anticipated questions and their responses. When the Decision-Maker is a public figure, the team should also refresh their understanding of this Decision-Maker from the background research done during the Midwest Academy Strategy Chart session to inform their framing and messaging. Project Coordinators support their ECL team by facilitating practice sessions and providing feedback and support. Political environment and other factors that are outside of the control of the ECL team will influence the Decision-Maker response to their Action. Prior to the meeting, the Project Coordinator should identify with their ECLs a goal for the Decision-Maker meeting, that isn't dependent on the Decision-Maker's response. Examples of goals include: everyone feels proud of their presentations and ability to speak on their issue and Action; team is able to share their project to a Decision-Maker and/or their staff; and the team feels more confident about meeting with a Decision-Maker in the future.

In keeping with the values of the CAM process, the PC ensures that ECLs are the speakers during the meeting. Project Coordinators take a backseat to let their team shine. After the meeting, PCs also support ECLs through a debrief, identifying next steps for follow up including a thank you to the Decision-Maker.

Role of the Funding Agency

The role of the Funding Agency may depend on the type of agency it represents, the funding source for the CAM program, and other policies and procedures that dictate the Funding Agency role in engaging Decision-Makers, especially public officials. However, all Funding Agencies can provide training, technical assistance and support to prepare CAM Project Coordinators and their team for a meeting with the Decision-Maker. They may also have additional insight about or connections to the decision-maker to offer. Sometimes, Funding Agency staff may be able to attend meetings with Decision-Makers to show support or answer technical questions. As such, Funding Agency staff should check their agency protocol on their role in policy development and interaction with officials.

Step 4 Timeline



Deliverables

- **6 month (August- December) training plan and sample workshop:** Project Coordinators provide a rough draft weekly workshop plan of topic areas as well as one sample detailed workshop. This allows for the Funding Agency to provide feedback on the timing of workshop activities to ensure alignment with deliverables. The sample workshop can provide insight on their curriculum development, workshop structure, and team building approach. Project Coordinators can also share these during partner meetings to attain peer feedback from other Project Coordinators. For most PCs, this level of workshop development is a newer skill and needs some supporting.
- **Emerging Community Leader pre-survey:** Newly recruited Emerging Community Leaders are required to fill out a survey to assess baseline knowledge and skills. A summary report is shared with their Project Coordinators to identify areas of strengths and opportunities for training and skill building on their team.
- **Action ideas and rationale:-** Project Coordinator will describe 2–3 Action ideas that their ECL team came up with along with the rationale and how each meets the core criteria of an Action. Funding Agency reviews these to then provide guidance on which direction may be most fruitful to move forward on. Sometimes Funding Agency staff may have to check-in with their leadership in their department to gain insight and approval on the direction.
- **Midwest Academy Strategy Chart (MASC):** Project Coordinators fill out the chart based on the ideas of the Emerging Community Leaders. Typical MASC requires teams to identify a list of allies, opponents, a primary and secondary Decision-Makers, resources, and Tactics.
- **Initial Action plan and ideas:** PSE change, Educational Packet distribution ans endorsement plan, media campaign ideas, Demonstration Project ideas, stakeholder engagement ideas- Based on the MASC, PCs and ECLs

develop a more thought out plan for gathering endorsements through one-on-one meetings with ally community organizations. They also then develop some initial ideas for other tactics, including roles that each individual ECL may play and general timeline.

- **Mid-year report:-** Project Coordinators reflect on the accomplishment and challenges over the last 6-months for both capacity building of ECLs and Step 4. They also provide feedback to trainings, technical assistance and the program overall for quality improvement of the CAM process.
- **Stakeholder engagement plan:** Project Coordinator and their team identify and list the key stakeholders that they will be engaging, how and when they will reach them, and delineate roles among their team.
- **Demonstration Project plan:** Project Coordinator and their team develop a plan with a timeline on how they will design (plan), implement (do), and evaluate (check) their Demonstration Project. This tool also helps the ECLs identify their roles and a timeline for completing their Demonstration Plan.
- **Media plan:** Project Coordinators and their team identify key audience(s) that they will reach through social media and traditional media. The media plan tool will guide them in developing 3 key messages, an editorial calendar, and identify lists of influential social media accounts and other media channels.
- **Action plan progress report:** Project Coordinators report on the progress of each Tactic in the Action Plan, the success, challenges, and technical assistance/support need. This helps the Funding Agency to gain a stronger grasp on their progress and informs how to provide more tailored technical assistance them in the last few months of the CAM process.
- **Demonstration Project report:** Project Coordinators and the ECL team develop a 1-2 page report that can be included in their Educational Packet about their Demonstration Project. This report should be well

designed, succinct, and describes the success of the Demonstration Project to key stakeholders and Decision-Makers.

Trainings delivered by Funding Agency

For Project Coordinators:	For Emerging Community Leaders
1. Two-day PC Training • Icebreaker • CAM Step 4 & 5 Overview* • Deliverables Timeline • PSE change workshop* • Planning a training • Group management and facilitation (outside trainer) 2. Midwest Academy Strategy Chart training 3. Demonstration Project planning workshop* 4. Project planning with youth (outside trainer) 5. Developing a message strategy based on the audience* 6. Meetings with elected officials/stakeholders; one-on-one meetings	1. ECL Orientation* 2. Icebreakers 3. Community agreements 4. Overview of Step 4* 5. Example of youth/young adult organizing 6. Youth organizing simulation: building allies* 7. Using social media for social change 8. PSE change workshop*

**denotes training curriculum or agenda included in this toolkit*

Recommended Trainings for ECLs by CAM Partners

- Developing and sharing a 2-minute elevator pitch about your project issue
- Presentations and one-on-one meetings to gain endorsements
- Public speaking skills
- Attend and observe a public hearing at the San Francisco Board of Supervisors or other elected board
- Midwest Academy Strategy Chart
- San Francisco policy making 101

Step 4 Strategies

1. **Review previous CAM Actions and community-led campaigns to motivate CAM Project Coordinators and teams as well as identifying best practice strategies.** Step 4 of the Community Action Model is when CAM teams move from research into community organizing and campaign work. For many community members, especially young people, the concept of building power through campaign Tactics and meeting with Decision-Makers seem daunting and unachievable. Providing examples of past CAM projects or current and relevant community-led Policy-System-Environmental change campaigns can not only inspire them but also help them see what real-life Tactics look like. Use examples with community members that are similar in age and demographics or working on similar issues to increase relevancy and identification.
2. **Use the collective wisdom of Project Coordinators to help generate some Action ideas for each team if they are having trouble coming up with one.** Given that there is often ECL turn-over and a break of continuity between Step 3 and 4, Project Coordinators may have a hard time guiding their team toward identifying a few potential Policy-System-Environmental change (Action) solutions. Some ECLs may have been part of the project from the beginning, while others are just beginning

to understand the issue and integrating the data collected during Steps 2 & 3. Workshop #3 in the PSE series helps Project Coordinators and their teams in identifying potential PSE ideas that "break the chain," but sometimes ECLs and Project Coordinators may still be at a loss as to what is feasible and realistic. During a monthly all CAM Project Coordinator meeting, use brainstorming to come up with potential Action ideas for each project so that Project Coordinators have a list of options in their back pocket in the event that their ECL team is having difficulty with this idea generation process.

3. **Clearly differentiate between an Action and a Demonstration Project.** An Action is the long-term goal of the CAM team's project. The Action is the Policy-System-Environmental change solution which will be sustainable and requires a decision-making body to create that change. On the other hand, a Demonstration Project is a shorter-term Tactic that builds community power and shows the viability of the Action. Sometimes, CAM teams have difficulty in differentiating between the two, especially since they are quite "jargony." Therefore, it's important that Funding Agencies make sure that Project Coordinators grasp the difference between the two and, in turn, are able to guide their teams to do the same. It can be helpful to use analogies to describe the Demonstration Project as beta-testing a product, app or concept, or explain the different criteria for the two terms, emphasizing the short-term aspect of the Demonstration Project versus the long-term aspect of the Action.

4. **The Midwest Academy Strategy Chart (MASC) is a useful tool that guides CAM project teams to develop a strategy to reach one target Decision-Maker while the CAM Action Plan tool helps flesh out their plans for each Tactic.** The MASC tool has been widely used and is effective for policy-campaigns; however, it may take multiple workshops and extra time for a CAM project to work through it. It is also important to emphasize that the team should complete one MASC for just one

Decision-Maker, and not for a decision-making body. It is essential to pick an individual person as the target Decision-Maker. It's also important to emphasize for CAM Project Coordinators the connection between the MASC and the Action plan tool- the MASC draws out many of the crucial details about WHO should be the focus of the campaign effort; the group next needs to determine HOW that will occur (through the planning of specific Tactics as written into the Action plan). Funding Agencies can determine if they want to require a specific Tactic or not, and whether the additional scaffolding of an Action plan tool is helpful for their CAM project.

5. **Recognize that the political and social landscape directly influences the direction and feasibility of both the CAM Demonstration Project and Action. Support Project Coordinator in identifying back up plans or "wins."** In community organizing and campaign work, things don't always go as planned. Decision-Maker and community member response to CAM projects will steer the course of the CAM team tactics and timelines. It is important for the Funding Agency staff to recognize and acknowledge this reality for Project Coordinators, and help them identify a "Plan B" and ways to frame direction changes to their teams. Often ECLs may feel frustrated or disappointed by changes, and it is important for Project Coordinators and Funding Agencies to identify the wins they have already achieved and positive aspects of the changes so that ECLs continue to be engaged in the process. Certain Tactics, like a press conference where ECLs are showcased, can help them feel acknowledged and can highlight their wins. This is especially true when they see themselves in print, on a blog, or on radio or TV.
6. **Encourage Project Coordinators to initiate stakeholder or community presentations early on in Step 4 to help set up the team well for gaining endorsements and creating strong connections for their Demonstration Project.** CAM project tactics related to the

Demonstration Project and Decision-Maker meetings are dependent on their meetings with community stakeholders. For example, if they want to do a Demonstration Project at a school, they have to get school administrators, staff and teachers on board first. Given that relationship-building and scheduling takes time, Funding Agencies should encourage Project Coordinators to start initiating and planning out these key stakeholder meetings as soon as the teams land on an idea for a Demonstration Project. This gives the ECLs time to prepare for presentations and meetings and develop materials with a clear timeline to do so.

7. **Provide an introductory training on local government structure, agencies, Decision-Makers and the local policy-making process early on in Step 4.** Project Coordinators will need to have a foundational understanding of how their city, county or institutions work so that they can ground their Action and Action plan development with their ECLs. The training can help PCs better articulate and think about potential Actions when they are guiding their ECLs in generating ideas. The PC will also know who to point their team toward when deciding on a primary and secondary Decision-Maker target. Knowing who holds the power locally and how the institutions of power operate is key for a successful Action. PCs should have a working knowledge of potential key stakeholders that they can engage, which will also be helpful in setting up and planning for their Demonstration Project. A working knowledge of local government structure and process will also help PCs and ECLs alike be more effective as community leaders outside of the CAM project.
8. **Consider more Funded Agency guidance and check-ins with CAM Project Coordinators during Step 4 to support progress and provide technical assistance.** Depending on the experience of the PC in implementing Tactics in Step 4, the Funding Agency may want to increase the frequency of 1:1 check-ins to twice a month. This will also be the case

Step 4
Training Samples

Step Four shifts from a research focus, to a community organizing and campaigning stage. In this step, PCs will support ECLs in developing skills to become change makers in their communities, while honing their own skills to set their team up for success. By sharing examples of examples of successful PSE change solutions, as well the policy making process in your respective city, this can help PCs gain a better understanding of what to expect in Step 4.

The sample training agendas included in this section include the following:

1. **PC Training**
   An introductory training to Step 4 for PCs that provides an overview of the step, applies the PSE workshop series, and shares group management and facilitation strategies.
2. **ECL Orientation**
   An introductory training to Step 4 for ECLs that provides an overview of the step, youth organizing, and share experiences from previous ECLs.
3. **PSE Change Workshop Series**
   A workshop series curriculum designed for PCs to help them guide ECLs through identifying an Action ad selecting a Demonstration Project.
4. **Bright Research Group's Using Social Media for Change**
5. **Meeting with Decision-Makers**

> Remember to use these samples as a guide to create your own trainings for your CAM participants. Tailor and customize!

Train-the-Trainer Training:
Developing A Message Strategy Based on the Audience

Learning Objectives: Participants will learn about tailoring their key messages for audiences reached through traditional and social media channels

Facilitator's Agenda

Time	Content	Resources
0:00–0:30	• Welcome/Mingling • Review Step 4 / other announcements • Introduce Kristina and Vanetta	• Food (SF TFP), Nametags
0:30–0:40	• Icebreaker: Ask each PC to share their name, organization and response to the following: "Share the most interesting and persuasive data point, learning, or message that your team has developed about your CAM action?"	• Flip Chart • Markers
0:40–0:50	• Overview of Different Media Channels and the Elements of a Good Message	• Key Messaging Handout (front)
0:50–1:00	• Pair Share Activity- How *would you present this media channel and messaging to your ECLs in a way that captures their attention.*	
1:00–1:50	• Message Development Workshop	• Education Packets • Key Messaging Handout (back)
1:50–2:00	• Close-out: +/Δ activity	• Flip Chart • Markers

ECL Orientation Building Allies

Super Jail Scenario

Facilitator Guide

Workshop Objective:

1. ECLs will practice how to effectively communicate with another stakeholder group to gain an endorsement through a simulated one-on-one meeting.
2. Through the simulation they will practice developing and sharing key messages about their issue, Action and identified decision-maker. They will also try to gain an ally and decide on collaborative tactic.

How this connects to CAM Step 4:

1. CAM Projects will be working on gaining power by building their base through one-on-one meetings with community stakeholders to gain endorsements.
2. CAM groups will also have to critically think and identify their primary decision-maker. During this simulation each group will have to identify a target decision-maker based on the scenario.

Handouts

1. Participant Instructions
2. Just the Facts: What you need to know about Gato County
3. 6 Groups: Who you are and Your Potential Ally
4. One-on-One Meeting Worksheet
5. Endorsement Form Template
6. Project Coordinator Expectations and Roles

Outline (1.5 Hours)

1. Introduction (5 Mins)

- Explain the goal of the simulation: gain an ally!
- Objective of the simulation: practice one-on-one meeting and getting an endorsement
- Connect it to what they will be doing in CAM Step 4
- Re-define/explain “one-on-one” meetings — explain the purpose of having one-on-one meetings

2. Scenario Enactment (10 Mins)

- Read Narrative (taken from scenario)
- Introduce the Board of Supervisors ft. Tobacco-Free Project Staff
- Each Supervisor reads their biography

3. Setup Instructions: (10 Minutes)

- Break the ECLs into 6 groups by counting off/or numbers on their name tag
- Explain that the groups will have:
    - Twenty-five minutes to plan for their one-on-one meeting with their assigned potential ally
    - PC assign will randomly assign people roles: note-taker (2), designer, and spokespeople (2)
    - 10 minutes for their one-on-one meeting with their potential ally
    - PCs/TFP staff will support each group and hand off papers/ worksheets
    - Materials to help you:
        1. Instructions
        2. Just the Facts: What you need to know about Gato County
        3. About You and Your Ally Organization
        4. One-on-One Planning Worksheet
        5. Endorsement Template

Group	Organization	Potential Ally
1-Angel	YELP: Youth Empowerment Leaders Program	Parent Action Network (RoShon)
2-Randy	YELP: Youth Empowerment Leaders Program	Greenhills Homeowner (James)
3-Itzel	YELP: Youth Empowerment Leaders Program	STEAMing Parents (Edel)
4-Edel	YUP: Youth UpWards Project	Parent Action Network (Randy)
5-RoShon	YUP: Youth UpWards Project	Greenhills Homeowner (Itzel)
6-James	YUP: Youth UpWards Project	STEAMing Parents (Angel)

4. One-on-One Meeting Planning (25 Mins)

- Project Coordinator assigns roles
- Discuss and fill out One-on-One meeting worksheet & Endorsement Form Template
- Create Poster

5. One-on-One Meeting (10 Mins)

- Introduction
- Group share about their organization's stance on the issue & rationale
- PC will
- If decide to endorse/support one another, discuss a target decision-maker
- Come up with one tactic your two groups want to work on together

6. Debrief & Share Out (30 Mins)

- Debrief & Discuss Simulation: What was difficult? What did you learn? (15 Mins)
    - How did you feel throughout the simulation?
    - Were there any challenges that came up during the process?
    - What do you think you all could have done to improve the outcome of the meeting?
    - How do you feel about preparing for one-on-one meetings for CAM?
- Each group share about result of their meeting & any take aways (15 mins)

ECL YOUTH GROUPS:

1. **Youth Empowerment Leaders Program (YELP)**: Youth organization located on the border of District 1 and 2. This organization builds leadership of transitional age youth of color through mentorship, internships, and training on civic engagement and activism. Most of the young people live in District 1 and 2. Youth and staff of YELP have done extensive research on the impact of juvenile detention on the lives of young people, their family and community, specifically economically and mental health. They know that youth of color, like themselves, are over represented in the county juvenile hall. They are fervently against the proposed juvenile hall! They rather the funding be towards more grants and programming so that more young people of color graduate from high school, go to college, and are actively involved in decision-making in their community.
2. **Youth Upwards Project (YUP):** The youth of YUP are high school to transitional age youth who were once system involved. Their organization focuses on providing, case management, mental health services, mentorship, tutoring and other programming. YUP has come out strongly against the new juvenile hall proposal, and many of the youth want to share their stories and voice their concerns to the Board of Supervisors. They know firsthand how the prison environment has been traumatizing, dehumanizing and negatively impacted their growth and development. They want to start mobilizing other young people, families and teachers against the proposal, and rather that the funding go towards youth violence prevention and alternative to incarceration.

POTENTIAL ALLY GROUPS

3. **Parents Action Network-Gato County:** Parents Action Network is a state-wide network that represents parents whose children are involved in the system. PAN has about 500 plus members of parents, youth organizations, and other agencies. Their goal is to provide case management, legal support, and other services to families and parents. When they heard about this proposal, they held an educational meeting with 30 parents in Gato County. PAN- Gato County subcommittee was formed through this meeting and they are now working to mobilize and advocate against the new juvenile hall. They rather that the funding goes towards fixing up the old juvenile hall and providing more career and educational opportunities for incarcerated youth there.

   Greenhills Homeowners: The Greenhills Homeowners are NIMBY (Not in my Back Yard) older and mainly Caucasian families who are concerned about their housing prices and safety of their community. Half of these families have children who go to Gato County schools, while the other half send their youth to private schools. They do not want the juvenile hall built in their neighborhood and rather the funding go towards anything else related to youth education and programming, such as better recreation programs, outdoor education or after school programs.

4. **STEAMing Parents:** A network of parents from all over Gato County who are focused on bringing more Science, Technology, Engineering, ARTS, and Math programing to the school district. They also oppose the new juvenile hall plan because they want the funding to go to more STEAM resources, teachers and programming to all the middle schools in Gato County. Due to budget restraints, Gato County middle schools have not had any arts related classes, like music, dance, theater, and etc., for the last decade. Middle school students in Gato County also score below average in their state for math and science, especially in District 1, 2, and 5.

ROLE PLAY: GATO COUNTY BOARD OF SUPERVISOR MEETING:

Narrator: This scenario is based loosely on true events that happen in Alameda County and San Francisco County. Next up on the Gato County Board of Supervisor agenda is Supervisor Hu-Nguyen's proposal to use the $2 million dollars youth and education program funding for building a new Juvenile Hall.

Supervisor 3 Alice Hu-Nguyen: Thank you. Honorable Supervisors of Gato County, we have surplus funding in our Youth and Education Program funding from the last fiscal year. I am proposing that we spend these funds to develop a new juvenile hall in my beautiful district of Green Hills to replace the old, decrepit downtown juvenile hall. The latest building maintenance reports show that the current hall needs new plumbing, earthquake retrofitting, and major upgrade of its facilities. As it stands, the Downtown Juvenile Hall is still stuck in the 1930s when it was built. Additionally, the current juvenile hall only has 100 beds and is always at capacity.

Instead, I want you all to imagine a new juvenile hall with state of the art facilities, including a larger outdoor area for physical activity, technology labs for youth to learn coding and complete their GEDs, industrial sized kitchen and cafe for job training, and newer facilities for room and board. We would make sure that there will be at least 500 beds to house young people, and never be over capacity. This would all be situated in my beautiful district of Geen Hills, where things are serene and peaceful. It will be like a retreat space for the youth and for their families when they visit. The correction officer union is also supportive of this project as it could bring in more jobs for the county. They also want better working conditions, programming space and support for the detained youth.

I've already reached out to a few developers about the project and they are eager to send their proposals for well within the budget. We could tear down the old juvenile hall and sell the land for a developer for affordable housing to address our current housing crisis in Gato County. I've already pulled together a budget for both projects, and I believe it will be a win-win situation for the juvenile hall and affordable housing issues.

Supervisor AJ of District 1 (Downtown): Thank you Supervisor Hu-Nguyen for the proposal. Now we will have time for comments about our stances on the proposal before it goes for further discussion into committee.

As the district supervisor for the Downtown neighborhood and the President of the Board, I am concerned about relocating our juvenile hall into Green Hills because it poses a burden to families. Many of the families of youth detained in juvenile hall come from my district, about 40% of them. The current Downtown location of the hall makes it easier for parents to visit and support their child during court hearings which are also located in downtown. Green Hills is a half hour drive eastward. But many of our families rely on public transportation, making the trek to the proposed location at least 1.5 hours with two or three bus transfers. The $2 million dollars would be better on after school programming in our schools, which is lacking my district. Over 200 parents and youth organizations signed a petition asking for all elementary, middle and high schools in my district to offer reduced cost after school programs. Many of my families are low-income who cannot afford to pay for after school programming, so their kids go home or are with a family member after school. After school programs greatly support and enrich our children's education and extracurricular activities, and should be available to all families in Gato County. Furthermore, adding more beds to the juvenile hall sends a message that says that we want more of our Gato County youth detained in juvenile hall. As a representative of my community, I do not want to see more of our young people detained and separated from their families and communities. Supervisor Hu-Nguyen, I am against building the new juvenile hall.

Supervisor Brittany Chan of District 2 (Riverside): Thank you Supervisor Hu-Nguyen for your proposal for the Youth and Education Program fund's $2 million dollars. As you know, I am all about supporting our entrepreneurs and small businesses through my #UpstreamRiverside Initiative. A few new developers in Gato County have caught wind of your idea of including a kitchen and coding lab in the new juvenile hall proposal and messaged me on Twitter saying that they would love to partner with us in developing and coordinating those programs for the youth. However, recently my Facebook page has bombarded with families who have been asking for more bi-lingual and ESL programming in our schools. We have so many immigrant, English as a second language families in Riverside but only one elementary school has ESL classes. We also only have a part-time ESL coordinator. The Youth Education Program fund could be better used for staff, classes and other programming to support our immigrant families and youth. But, your proposal of including facilities and programming in juvenile hall for youth to be equipped with training and skills will help young people get a leg up when they are no longer detained. I would like to hear more about what my community thinks about this issue before I make a stance.

Supervisor Kitty Thornton of District 4 (Middletown): Supervisor Hu-Nguyen, I fully support your proposal for a new juvenile hall in your district. Over the last 10 years, I have been working with 50 plus developers, small tech companies, and entrepreneurs in my Middletown Revival initiative, and it's paid off! Similar to your district, we didn't have a lot of jobs opportunities and families were moving out but now we've got economic and social capital! Instead of a rundown, forgotten industrial district with empty housing lots, we are now a community of artist lofts, co-worker tech spaces, small businesses, and even urban agriculture. The new juvenile hall can bring more jobs and also make sure that youth are job-ready when they leave. Plus the old juvenile hall is no place for youth to be living or people to working in. We should definitely bulldoze that down to build new affordable housing in downtown. I am all for it!

Supervisor 5 Arletha Murray of District 5 (Bayside): Supervisor Hu-Nguyen. Your proposal for a new juvenile hall seems appealing at first but you have not considered the unintended impacts of the proposal and the existing facts about youth crime. I am concerned about the burden it places on families of detained youth as they would be further geographically separated. A third of the youth in juvenile hall come from my district which is the furthest from Greenhills district. Families would have to drive an hour or take 2 hours of public transportation to get there on a good day from the ports. True, the conditions of the old juvenile hall are horrendous and need to be fixing, but a new juvenile hall with more beds and across the County is not the answer. Even if you are proposing better support services, a larger outdoor recreation area and job development programming, we are still making the statement to our families and communities that we expect to see a rise in youth crime and detention. Youth crime and detention has been decreasing steadily over the last 10 years. Youth violence prevention programs, after school programming, and restorative justice initiatives in our schools have been working. Let us put the funding towards fixing up the existing hall and incorporating more robust job training programs. More importantly, I ask that we spend at least half of the $2million on the youth violence prevention initiatives and programs that have worked.

Project Coordinator Role Sheet

During the simulation Project Coordinators (PC's) will be playing two main roles:

1. PC's will help support an ECL group in navigating the meeting preparation
2. PC's will role-play as a potential ally support group that meets with an ECL group

INSTRUCTIONS:

One-on-One Meeting Prep (25 Mins)

1. Randomly assign the roles to your ECL group, making sure that there is at least one facilitator, note-taker, designer and spokesperson per group. Use the envelope provided for each team to draw roles
2. Refer to the Chart below to see which ECL group the PC will be paired with
    - PC will be paired with one group to help support their meeting prep
    - Then the PC will role-play as a potential ally to meet with an ECL group

SIMULATION ROLE PLAY (10 Mins)

3. During the simulation one-on-one meeting the PC will maintain in their role-play with the ECL group during the course of the entire meeting
4. Once the meeting is complete, the ECL group and PC will exchange brief comments and feedback

DEBRIEF IN ORIGINAL NUMBERED GROUPS (20 Mins)

During the debrief, return to the numbered group you are assigned to support to facilitate the debrief:

- How did you feel throughout the simulation?
- Were there any challenges that came up during the process?
- What do you think you all could have done to improve the outcome of the meeting?
- How do you feel about preparing for one-on-one meetings for CAM?

GROUP SHARE OUT (2–3 Mins)

Have a spokesperson share their organization name, the outcome of the meeting and one highlight from your debrief.

Group	Organization	Potential Ally
1-Angel	YELP: Youth Empowerment Leaders Program	Parent Action Network (RoShon)
2-Randy	YELP: Youth Empowerment Leaders Program	Greenhills Homeowner (James)
3-Itzel	YELP: Youth Empowerment Leaders Program	STEAMing Parents (Edel)
4-Edel	YUP: Youth UpWards Project	Parent Action Network (Randy)
5-RoShon	YUP: Youth UpWards Project	Greenhills Homeowner (Itzel)
6-James	YUP: Youth UpWards Project	STEAMing Parents (Angel)

Overall Tips & Expectations

- When supporting an ECL group in navigating meeting preparation
- Be transparent with the ECL group that you are paired with that you are there to support and they need to take leadership in preparing for the simulation meeting
- Only intervene if students are really having trouble with the simulation
    - Point them towards first reading the role and scenario information, then have them go through the One-on-One meeting instructions and worksheet
- When roleplaying as the parent group:
    - Maintain the role-play and think about where the potential ally group would have common interest but also disagree with the ECL group
    - Also be prepared with some clarifying questions to ask the youth during the meeting to make the one-on-one meeting more realistic
- Overall, the goal is to have the youth practice their skills, work in teams and have some fun
- There is no definitive right or wrong way to approach the simulation and so really encourage the youth to practice following the simulation by themselves

GROUP 1: YOUTH EMPOWERMENT LEADERS PROGRAM (YELP) MEETING WITH PARENT ACTION NETWORK

About YELP:

Youth organization located on the border of District 1 and 2. This organization builds leadership of transitional age youth of color through mentorship, internships, and training on civic engagement and activism. Most of the young people live in District 1 and 2. Youth and staff of YELP have done extensive research on the impact of juvenile detention on the lives of young people, their family and community, specifically economically and mental health. They know that youth of color, like themselves, are over represented in the county juvenile hall. They are fervently against the proposed juvenile hall! They rather the funding be towards more grants and programming so that more young people of color graduate from high school, go to college, and are actively involved in decision-making in their community.

About Parent Action Network:

Parents Action Network is a state-wide network that represents parents whose children are involved in the system. PAN has about 500 plus members of parents, youth organizations, and other agencies. Their goal is to provide case management, legal support, and other services to families and parents. When they heard about this proposal, they held an educational meeting with 30 parents in Gato County. PAN- Gato County subcommittee was formed through this meeting and they are now working to mobilize and advocate against the new juvenile hall. They rather that the funding goes towards fixing up the old juvenile hall and providing more career and educational opportunities for incarcerated youth there.

GROUP 2: YOUTH EMPOWERMENT LEADERS PROGRAM (YELP) MEETING WITH GREEN HILLS HOMEOWNERS

About YELP:

Youth organization located on the border of District 1 and 2. This organization builds leadership of transitional age youth of color through mentorship, internships, and training on civic engagement and activism. Most of the young people live in District 1 and 2. Youth and staff of YELP have done extensive research on the impact of juvenile detention on the lives of young people, their family and community, specifically economically and mental health. They know that youth of color, like themselves, are over represented in the county juvenile hall. They are fervently against the proposed juvenile hall! They rather the funding be towards more grants and programming so that more young people of color graduate from high school, go to college, and are actively involved in decision-making in their community.

About Green Hills Homeowners:

The Greenhills Homeowners are NIMBY (Not in my Back Yard) older and mainly Caucasian families who are concerned about their housing prices and safety of their community. Half of these families have children who go to Gato County schools, while the other half send their youth to private schools. They do not want the juvenile hall built in their neighborhood and rather the funding go towards anything else related to youth education and programming, such as better recreation programs, outdoor education or after school programs.

GROUP 3: YOUTH EMPOWERMENT LEADERS PROGRAM (YELP) MEETING WITH STEAMING PARENTS

About YELP:

Youth organization located on the border of District 1 and 2. This organization builds leadership of transitional age youth of color through mentorship, internships, and training on civic engagement and activism. Most of the young people live in District 1 and 2. Youth and staff of YELP have done extensive research on the impact of juvenile detention on the lives of young people, their family and community, specifically economically and mental health. They know that youth of color, like themselves, are over represented in the county juvenile hall. They are fervently against the proposed juvenile hall! They rather the funding be towards more grants and programming so that more young people of color graduate from high school, go to college, and are actively involved in decision-making in their community.

About STEAMING Parents:

A network of parents from all over Gato County who are focused on bringing more Science, Technology, Engineering, ARTS, and Math programing to the school district. They also oppose the new juvenile hall plan because they want the funding to go to more STEAM resources, teachers and programming to all the middle schools in Gato County. Due to budget restraints, Gato County middle schools have not had any arts related classes, like music, dance, theater, and etc., for the last decade. Middle school students in Gato County also score below average in their state for math and science, especially in District 1, 2, and 5.

GROUP 4: YOUTH UPWARDS PROJECT (YUP) MEETING WITH PARENT ACTION NETWORK

About Youth Upwards Project (YUP):

The youth of YUP are high school to transitional age youth who were once system involved. Their organization focuses on providing, case management, mental health services, mentorship, tutoring and other programming. YUP has come out strongly against the new juvenile hall proposal, and many of the youth want to share their stories and voice their concerns to the Board of Supervisors. They know firsthand how the prison environment has been traumatizing, dehumanizing and negatively impacted their growth and development. They want to start mobilizing other young people, families and teachers against the proposal, and rather that the funding go towards youth violence prevention and alternative to incarceration.

About Parent Action Network:

Parents Action Network is a state-wide network that represents parents whose children are involved in the system. PAN has about 500 plus members of parents, youth organizations, and other agencies. Their goal is to provide case management, legal support, and other services to families and parents. When they heard about this proposal, they held an educational meeting with 30 parents in Gato County. PAN- Gato County subcommittee was formed through this meeting and they are now working to mobilize and advocate against the new juvenile hall. They rather that the funding goes towards fixing up the old juvenile hall and providing more career and educational opportunities for incarcerated youth there.

GROUP 5: YOUTH UPWARDS PROJECT (YUP) MEETING WITH GREEN HILLS HOMEOWNERS

About Youth Upwards Project (YUP):

The youth of YUP are high school to transitional age youth who were once system involved. Their organization focuses on providing, case management, mental health services, mentorship, tutoring and other programming. YUP has come out strongly against the new juvenile hall proposal, and many of the youth want to share their stories and voice their concerns to the Board of Supervisors. They know firsthand how the prison environment has been traumatizing, dehumanizing and negatively impacted their growth and development. They want to start mobilizing other young people, families and teachers against the proposal, and rather that the funding go towards youth violence prevention and alternative to incarceration.

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GROUP 6: YOUTH UPWARDS PROJECT (YUP) MEETING WITH STEAMING PARENTS

About Youth Upwards Project (YUP):

The youth of YUP are high school to transitional age youth who were once system involved. Their organization focuses on providing, case management, mental health services, mentorship, tutoring and other programming. YUP has come out strongly against the new juvenile hall proposal, and many of the youth want to share their stories and voice their concerns to the Board of Supervisors. They know firsthand how the prison environment has been traumatizing, dehumanizing and negatively impacted their growth and development. They want to start mobilizing other young people, families and teachers against the proposal, and rather that the funding go towards youth violence prevention and alternative to incarceration.

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One-On-One Meeting Participant Instructions

A. Your Roles For The One-On-One Meeting

- Facilitator will be helping the team discuss and complete the "Planning for a One-on-One Meeting Worksheet."
- Note-taker #1 should help fill out the Planning for One-on-One Meeting Worksheet based on the group's discussion

- **Note-taker #2** will filling out your "Endorsement Sheet" based on your answers
- **Designer(s)** will be creating an "educational packet" poster with a slogan, key facts, and or visuals/graphics
- **Spokespeople(s)** will preparing and speak for the team for your one-on-one meeting and group share out.

B. Plan For Your One-On-One Meeting

1. Read about your organization, ally organization, and fact sheet on Gato County & Supervisors.
2. **FACILITATOR** should help group discuss and answer the questions on the "Planning for a One-on-One Meeting Worksheet" while **NOTE-TAKERS** helps fill out the (1) Worksheet & (2) Endorsement "Back Us Up" sheet based on the discussion
3. **DESIGNER** should make a campaign "educational packet" poster with slogans, key facts and/or images
4. The group should then plan to meet with your potential ally organization using the following structure of the one-on-one meeting:

Steps	Description
Legitimize Yourself	• Introduce Self & Organization • Your Issue & How it Connects with Their Org
Listen!	• Ask about their organization & what their interests, values are
Agitate	• Share truths about your issues & how it is important to you & why you think it should be important to them
Get a Commitment	• Tell them about your solution and target supervisor • Ask for a specific commitment based on interest and capacity of the org
Follow Up	• Thank them for the meeting • Ask them for their contact for follow up

Group Debrief (15 Minutes)

A Project Coordinator will help your team debrief:

- How did you feel throughout the simulation?
- Were there any challenges that came up during the process?
- What do you think you all could have done to improve the outcome of the meeting?
- How do you feel about preparing for one-on-one meetings for CAM?

Group Share out (2 minutes):

- Your organization, Your target and demand, and result of your one-on-one meeting.
- One thing you all shared or discussed from the debrief

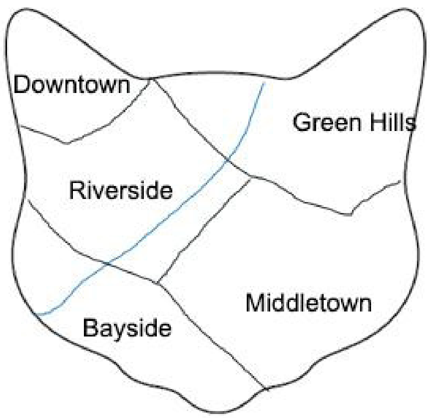
Just The Facts

WHAT YOU NEED TO KNOW ABOUT GATO COUNTY

Gato County, Established 1843

Population: 650,000

- White: 30%
- Asian: 22%
- Black/African-American: 15%
- Hispanic/Latino: 18%
- Native American: 7%
- Some Other Race: 8%



Supervisorial Districts:

1. Downtown, Cheryl Jones
2. Riverside, Brittany Chan
3. Green Hills, Alice Hu-Nguyen
4. Middletown, Katharine Thornton
5. Bayside, Arletha Murray

Facts about Gato County Youth Crime & Juvenile Hall

- Downtown Juvenile Hall built in 1930s, not retrofitted and currently houses 100 people at a time
- 2018 average number of juvenile detainees: 94
- 65% males
- 55% Black/African-American
- Average age: 16 years old
- Annual incident of youth crime has gone down 7% between 2010 and 2015
- 2018 Gato County's Juvenile confinement rate at 21 per 100,000 youth vs State confinement rate at 33 per 100,000 youth
- Average time confined in juvenile hall: 25 days; State average: 21 days

Facts about Green Hills District

- Largest district in terms of square miles, but least populated, due a large nature preserve area.
- Green Hills Homeowners Association have a history of "Not In My Backyard" (NIMBYism) towards new projects like a mall or a new theater. They are afraid that their housing prices may also drop or their neighborhood may be considered unsafe due to the presence of a juvenile hall.
- 2 Bus lines, the X and the GH, go out to Green Hills
- District is made mainly of upper middle class, White families; 40% of them send their children to private schools.
- Only 5%-8% of detained youth come from District 3.

Supervisor Hu-Nguyen's New Juvenile Hall Proposal in Green Hills:

- Located in the Eastmont area of Green Hills District.
- 500 beds located in multiple dormitories or housing, would be State's largest juvenile hall
- 6 acres of outdoor recreation area, including sports field and trails

- Technology lab, industrial kitchen and cafe for job readiness training
- Increase Juvenile hall on-site staff from 15 to at least 50 staff
- Partner with vocational schools and other youth programs to improve education programming, case management, substance use support groups, and other services

GATO COUNTY SUPERVISORS

3 supervisors have to vote yes in order to pass a building project.

Supervisor AJ of District 1 (Downtown): Against building the new juvenile hall. She represents communities of color, immigrants and low-income neighborhoods in Gato County. Their district is overrepresented in the youth who are detained at juvenile hall. Parents from their county express concern that there isn't enough youth programming and the schools are not getting enough resources. Parents with children in the system called them to express their concerns about how it would be difficult for their families to drive out to Green Hills to support and visit their children. They tends to lead initiatives that address inequities in the county, such as criminal justice reform, public health and education.

Supervisor Brittany Chan of District 2 (Riverside): Neutral about the new juvenile hall. She represents working class folks, Latinx and Vietnamese immigrant communities. Her main agenda is small business development and supporting new entrepreneurs, especially the cultural business corridors in his community. The families in his district have also pressured her to work on advocating for more after school programs, bi-lingual and ESL programming in schools, and gang prevention. She likes to utilize Facebook and twitter to promote her agenda around small business or address concerns in the community. She will often vote in alignment with District 1 or 4.

Supervisor Alice Hu-Nguyen of District 3 (Green Hills): Champion of the new juvenile hall. He represents predominantly, white, middle and upper class families who enjoy their suburban and quiet life-style. A third of district 3's families send their kids to private school because they find public schools subpar. Therefore, she's championed a lot of initiatives to improve the schools and youth enrichment programs in the county. Aside from education, she is also pro-environment and leads a lot of the green initiatives in the county such as wildlife preserves, green energy, active transportation, and recycling programs. Above all, Supervisor Hu-Nguyen cares deeply about the effectiveness and impact of any project or initiative. She strongly believes that the new juvenile hall will improve the wellbeing of those in detention, increase jobs for correction officers and more.

Supervisor Katharine Thornton of District 4 (Middletown): She supports the new juvenile hall building project, as she is pro-development. She has been working with a lot of developers on building projects in Middletown in her Middletown Revival initiative. Middletown was once a rundown industrial district with not a lot of businesses and empty housing lots. There are not a lot of families and residents in Middletown, but through her initiative more middle class families from outside of the county have been moving into the neighborhoods. She has been holding town hall meetings with these residents to identify how best to serve her growing constituents and ensure future supporters for the next supervisorial race. Along with pro-development, Supervisor Thornton has focused on affordable housing, health and small business.

Supervisor 5 Arletha Murray of District 5 (Bayside): She does not support the new juvenile hall building. The second largest proportion of Juvenile hall youth detainees come from her district. Her county is situated an hour west of the proposed plot in District 3 for the new juvenile hall. Her families are mainly lower-income white families who work in the port. She does tend to support new development in the county, but she projects that there may be pressure from families to not move the juvenile hall. She prefers that the funding goes towards more youth violence prevention programs that have been effectively decreasing the youth detention rates in the county.

One-on-One Meeting Planning Worksheet

Based on the description of your organization and your knowledge about similar organizations, youth issues and youth incarceration. Plan out what you will say during your one-on-one meeting by answering the following questions as a group:

1. **Define the Problem.** Describe the issue or problem at hand with Supervisor 3's proposed juvenile hall.

2. **Why does it matter?** Why does the issue of the new juvenile hall matter to your organization? What do you all care about?

3. **What do you think is the solution?** What is your group demanding happens with the $2 million for youth services?

4. **Who will you target?** Which decision-maker will you focus your campaign efforts towards?

- ☐ Supervisor 1
- ☐ Supervisor 2
- ☐ Supervisor 3
- ☐ Supervisor 4
- ☐ Supervisor 5

5. **What will your group do about it?** What campaign tactics will your team use to advocate for your stance? How would you want another organization to be involved?

- ☐ Social Media Campaign
- ☐ Letter to Editor
- ☐ Press Conference
- ☐ Petition or Endorsement Drive
- ☐ Demonstration Project
- ☐ Rally
- ☐ Protest
- ☐ Letters or Calls to Supervisor's office
- ☐ Public Comment at Hearings
- ☐ Other:

____

____

____

6. **Why does the issue matter to the other organization you will be meeting with?** Read the description of the other organization. Identify how your values or interests align.

7. **What's the Ask?** Decide what you may want to ask the organization to commit to as an ally organization and endorser.

Back Us Up!

Gato County's Education and Youth funding shouldn't be used to lock us up!

We, ____ ,
want your support to champion youth and young people in Gato County. The $2 Million dollars categorized for Youth and Education Funding should be used for: The funding should not be used for building a new juvenile hall in Green Hills because:

Back us up and join our movement!

ORGANIZATION/NAME:_ ____

CITY:____

ZIP: ____

EMAIL:____

PHONE NUMBER:____

I/We, ____ ,
endorse and support this campaign by (Check all that apply):

- ☐ Granting permission to use my/our name as an endorser
- ☐ Wanting to stay involved or participate in:
  - ☐ ____
  - ☐ ____
  - ☐ ____
- ☐ Spreading the word to others about the campaign
- ☐ Following, Like, and share social media handles and posts
- ☐ Showing up at Gato Board of Supervisor Hearing on November 15, 2018 and providing public comment
- ☐ Supporting in other ways:____

For more information, contact: ____

Follow us on Facebook, Instagram and SnapChat!

Tailoring Workshop

Scenario: High School Students

You will be facilitating CAM's Workshop 4 & 5: What is a Demonstration Project & Demonstration Project Idea for your 9th and 10th grade high school ECLs. Your ECLs are youth of color who live in San Francisco. Your weekly meeting is typically 1.5 hours long. For the last three workshops, you have found that the content is a little bit advance for your high school students. Unfortunately, this week you learned that one of the ECL's families is going through economic hardship and their family is facing eviction from their home. They have been living in their apartment in the Excelsior for almost two decades. You want to make sure that there is time in your weekly meeting to cover the workshop activity to meet your CAM deliverable deadline, and also make sure your CAM team can provide the ECL some support. Many of the ECLs have also expressed that their CAM topic issue doesn't matter anymore because the policy to end menthol and flavored tobacco has already passed in San Francisco. They've asked: Why do they need to work on a campaign for a solution to the issue if there is already a city-wide policy? Given the pressing, real issues that are impacting your ECL team like rising cost of housing, gentrification, and family struggles it has been difficult to keep your team engaged on the CAM project. You have initially sketched this out for a two week series, but now you aren't sure.

Identify at least 5 ways you would tailor Workshop 4 & 5: Demonstration Project to meet the needs of your team. Include how you would tailor the activities/content, timing and language level of the workshop.

Scenario: Transitional Age Youth (TAY)

You will be facilitating 4 & 5: What is a Demonstration Project & Demonstration Project Idea for your TAY ECL team. Your team is a mixed group with some ECLs who live and grew up in San Francisco while others are either here for school or live in another Bay Area city. Some ECLs are at SF State getting a BA getting a public health degrees while other ECLs are still working towards their GED.

Sometimes, the non-SF natives will defer to the SF natives or ECLs who are in college tend to take over the discussion.

One of your male ECLs tend to discount other people's ideas. Therefore, there are multiple dynamics even if they are the same age group. Your team meets weekly for 2.5 hours, so you are considering doing both Workshop 4 and 5 together in one week; however, you are concerned about how group dynamics may come into play. You want to make sure everyone understand the key concepts of the workshop and that all ECLs equally have a voice in identifying and planning your team's Demonstration Project.

Identify at least 5 ways you would tailor Workshop 4 & 5: Demonstration Project to meet the needs of your team. Include how you would tailor the activities/content, timing and language level of the workshop.

Project Coordinator Training, Day One

What	Agenda Items	Time	Who	Notes & Materials
Welcome/Intro	1. Welcome 2. Training Objectives & Agenda 3. Ice Breaker: Rock Paper Scissor Posse 4. Ask a PC to lead tomorrow's icebreaker	Hard Start: 9:15 9:15–9:30		Name Tags, Agendas, Sign-In Sheet Main Slide Deck Quick ice b
Orientation to CAM Program	1. CAM Steps 4&5 Overview 2. CAM Deliverables Timeline: July through December in detail, later in less detail	9:30–10–30		PPT Slide deck Deliverables handouts
Break		10:30–10:45		
PSE Workshop 1: 5 Whys of Health Inequities	**5 Mins**: MS provides overview of Workshop 1–5 series; explains that we will be leading through some parts of the workshop series. Make sure all PCs have workshop series curriculum, encourage note taking. At the end of each section we will have time for questions/modification ideas. Workshop 1 **1. 10 mins**: MS facilitates 5 WHYs activity with grape example, use the draw a number activity **2. 30 Mins (11AM Start)**: Break out into small groups to do 5 Why activity with 3 key findings; 3. M/F group + DS/BC 4. BACR, SCDC, YLI + MS/JE **5. 5-7Mins:** JE wraps up and asks for any feedback/modifications	10:45–11:45		Butcher paper Prep: small group assignments and example "PC sticker" or signifier for when TFP staff is acting as a PC Brittany to gather key findings for WHYs activity Each group will have one finding from each agency; 3 key findings total.
Lunch		11:45–12:30		

What	Agenda Items	Time	Who	Notes & Materials
PSE Workshop 2&3: What is PSE/Action + Select your CAM Action	• **5 Mins**: AH review goals of workshop 1–3. Outcome of Workshop 2–3 are 2–3 potential Action/PSE ideas for your team **Workshop 2** • **7 Mins**: AH do the definition portion of Workshop 1 with PCs and describe the "Everyday PSE Changes" activity • **10 Mins:** BC do the Action or Tactic Activity **Workshop 3 (12:55 start)** • **20 Mins:** AH and BC co-facilitate "Disrupt the Chain" activity, break PCs into two teams use grape cigarillo example • **7 Mins**: AH describes narrowing down activity to 2-3 Actions & asks for PC ideas for narrowing down • **5–7 Mins:** BC wraps up and asks for any feedback/modifications	12:30–1:30		Workshop Series 2& 3 Action vs Tactic Scenarios Note: Tactics are also valuable! Prize for Disrupt the Chain winner
Break		1:30–1:45		

What	Agenda Items	Time	Who	Notes & Materials

PSE Workshop 4&5: What is a Demonstration Project and Generating Demonstration Project Ideas	• **5 Mins**: DS review goals of workshop 4–5. Outcome of Workshop 4–5 is a Demonstration Project for one Action idea. Explain that after Workshop 2–3, ECL team Action ideas will need to be reviewed by TFP/DPH leadership.
	Workshop 4
	• **10 Mins**: DS lead “Role Play” activity
	• **7 Mins:** DS review through 5 ingredients; describe the Stand UP Sit Down activity
	Workshop 5 (2:10 start)
	• **10 Mins:** JE facilitate brainstorm activity using grape/grape tobacco example sample Action.
	• **15 Mins:** JE splits group into own groups to come up with a list of Demonstration Projects of their own using their WHY activity
	    • M/F group + DS/BC
	    • BACR + MS
	    • SCDC + JE
	    • YLI + AH
	• **5 Mins:** JE describes and asks for PC ideas for narrowing down to 1 Demonstration Project
	• **5 Mins:** JE describes newsworthy activity
		1:45–2:45		TFP to prepare a list of Demonstration Projects/ interactive cards – litter, YLI,

Workshop Wrap Up	**Workshop Wrap Up** • **AH** review through workshop 1-5 and key outcomes: 2–3 PSE ideas and 1 Demonstration Project • **AH** asks for feedback and any modifications	2:45–3:00		

What	Agenda Items	Time	Who	Notes & Materials
Turning and Action into Change	Talk about a previous successful PSE change created through a CAM action: • Prompt: how to get the group from diagnosis to PSE change/ action • Doing MWAC • Doing activities: ed packet, endorsements, media etc. • How did they identify and tailor to decision mak-ers – inner workings of government	3:00–3:40		Send talking points ahead of time
Wrap Up	**Wrap Up** Training Evaluation: +/Delta & Bullseye • DO the evaluation method for Day 1 of the train-ing with the PCs • Discuss pros and cons of the two evaluation methods • Share that PCs will be required to use either of these tools for 3 of your trainings per quarter. You can do it on a flip chart, take a picture and label it. There will be a submission form.	3:40–4:00		

Project Coordinator Training, Day Two

What	Agenda Items	Time	Who	Materials
Welcome	• Welcome • Training Objectives & Agenda • Ice Breaker	9:00–9:30		

Planning a Training – Part 1	• MS to review deliverables and ECL Training Plan document to set the stage for the conversation – how to go from deliverables to training plan to scheduling PC/ECL time?
	• JE to demonstrate a text-based monthly calendar, MS to demonstrate a visual monthly calendar (Aug)
	• JE to review expectations for weekly work and for the PC's 0.8 FTE commitment
	• MS to introduce the weekly calendaring activity, all staff to support their PC (as needed)
	    • Breathe + BC
	    • Rafiki + DS
	    • VYDC + MS
	    • BACR + AM
	    • SCDC + JE
	    • YLI + AH
	• MS and JE to debrief the activity with PCs – ask one or two PCs to share how they structure their calendars.
	• Visualizing progress on project for ECLs – JE and MS to demonstrate a few fun tools, ask PCs for how it works with their team + share resources
		9:30–10:30		• Deliverables schedule and ECL Training Plan docs or screenshots
				• Calendar handouts (2 types, color paper)
				• Weekly calendar handout (white paper)
				• Visualization tool examples

Break		10:30–10:45		

What	Agenda Items	Time	Who	Materials
Planning a Training – Part 2	• Breaking down the Demonstration Project activity from yesterday into a training series • Allow time for PCs to share what has worked for them in the past • Share SOUL training materials	10:45–12:15		• Calendar handouts • SOUL activity
Lunch	Lunch Break	12:15–1:00		
Group Management and Facilitation	Continue from the tailoring workshop — facilitated PC conversations • General helpful practices to keep audience engaged (including using tech or innovative tools) • Rolling with challenges/ obstacles/ resistance from youth when facilitating • Tools to encourage shy ones to speak up and loud youth to step down etc.	1:00–2:00		Pending workshop plans from CYAN
Break		2:00–2:15		
Group Management and Facilitation	Activity techniques/ samples	2:15–3:30		
Wrap Up	• Wrap Up • Two day Training Evaluation	3:30–4:00		Evaluation handouts

Weekly schedule

NAME: ____

Time / period	Monday	Tuesday	Wednesday	Thursday	Friday

Notes:

Think about including the following activities in your weekly schedule:

- Meetings with ECLs (1.5 hours weekly)
- Meetings with Lead ECL
- Meetings with TFP
- Meetings with your organization's leadership (all staff meetings, supervision meetings, etc.)
- Checking email and voice mail (daily)
- Posting on Groupsite (weekly)
- Preparing for this week's ECL meeting: What's on the agenda? What needs to be prepared?
- Preparing for next week/month's ECL meetings: What's on the calendar? What needs to be planned?
- Time to work on deliverables (August example: ECL recruitment and outreach, review Lead ECL applications
- Personal professional development and training — time for PC to learn, and develop skills
- Time for your other duties if working on additional projects

Demonstration Project Planning Workshop for Project Coordinators

Overview

During Step 4: Select Action or Activity and Implement, CAM projects will use the data they collected and analyzed during Steps 2&3 to decide on an ACTION or a Policy-System-Environmental Change that can be a solution to the issue they've researched.

Goal of Demonstration Project Workshops:

CAM Teams will develop and plan their Demonstration Project which will demonstrate and visualize their proposed PSE Change Solution (Action) for Step 4 of the CAM Project. An Action should be achievable, sustainable and be able to compel a decision maker or a stakeholder to change the environment for the wellbeing of all.

Learning Objectives of the Workshop Series:

1. ECL will be able to understand the concept of a Demonstration Project, its parameters and purpose in achieving their Action
2. ECLs will identify their Demonstration Project that will support their Action
3. ECLs will plan the implementation phase of their Demonstration Project
4. ECLs will finalize plans for their Demonstration Project, including timeline & roles

Pre Workshop	Workshop 4	Workshop 5	Workshop 6	Workshop 7
• PC review final Action Idea • PC generates a list of Demonstration Project ideas with TFP Lead based on Action	• CAM Team understand the concept of a Demonstration Project	• CAM Team generates Demonstration Project to support their Action	• CAM Team practices project planning and applies it to their Demonstration Project	• PC pre-develops finalized Demonstration Project Plan • CAM Team develops a budget and assign roles to the Demonstration Project

Workshop 4: Defining a Demonstration Project (1 Hour)

Project Coordinator Prep:

- PC reviews findings from Workshop 3
- PC prepares the role play activity handout for ECLs to read out loud
- PC prepares handout about Demonstration Project “ingredients”
- PC prepares the 8 outlined potential Demonstration Projects on sheets of paper or adds their own ideas

Materials needed:

- Various handouts prepared as listed above
- Post the flowchart that shows earlier Why discussions as a reminder of the overall project goals
- Markers
- Post-it Notes

INTRODUCTION AND REVIEW (5–10 mins)

- **Review:**
  - Review the steps so far- we identified our issue, brainstormed the things that cause that issue, came up with a lot of possible Actions to fix the issue, and decided our top 2–3 Action ideas.
  - Remind the group that they are working smart by really thinking through the issue. They uncovered many causes and many possible solutions. Then they picked the most reasonable solution ideas that could help their community!
  - Root the Step 4 work they are doing in a reminder of why this work is important. In Steps 1–3 they did a lot of work collecting information and key finding about why this issue is important to San Franciscans.
- **Share the Goal of today's workshop:**
  - To learn about Demonstration Projects: a tactic that is a brief example of how their Action idea can likely result in the change they are hoping to make

ROLE PLAY ACTIVITY (15 mins)

- **Purpose of the Activity:** Highlight importance of showing decision-makers the feasibility of a solution to gain their support.
- **Set it Up:** Decision-makers are leaders in an agency, organization or government that can make a change in how things are done. During Step 4, you want to compel a decision-maker to champion and support your Action/PSE idea to address your issue.

Facilitator: In this role play, some of you will be playing the role of a decision-making body — the Board of Education. The Board of Education learned that 43% of the high school students do not eat the recommended 2 cups of fruits and 2 cups of vegetables each day. For students who go to the schools in neighborhood that don't have access to affordable fresh produce, 66% of students say they don't eat the recommend amount of fruits and vegetables. The majority of the students qualify for reduced lunch, which means that they are from low-income families. The Board of Education is trying to find a way to address this issue, and have asked for proposed solutions.

Board of Education: Wow, we are upset by the fact that so many of our students are not able to eat healthy, and many of them are at risk for diabetes even at a young age. We must do something at our schools to encourage our students to eat more fruits and vegetables!

Some teachers, staff, parents and students have come up with ideas to improve the health of our students so that they can learn and thrive! We hope that their ideas are not just focused on changing someone's behavior (like teaching them the facts about nutrition). We are looking for a solution that changes the way things are done at schools that will encourage people to eat healthy. Let's see what ideas people came up with.

First up…

Annie, Economics Teacher: Board of Education, it's all about creating a supply of fruits and vegetables so that the students will then demand it. I say we provide free fruits and vegetable snacks for everyone during first period so that everyone will eat it. I did the cost analysis for this and in the end the cost for us to provide daily fruits and vegetables for all students for the whole school year will save the city tens and thousands of dollars on medical costs. The long term benefits outweigh the short term costs.

David, PTA parent chair: Board Members, our children need to be encouraged to eat more fruits and vegetables. Let's create a semester-long social media campaign, using Instagram and SnapChat, promoting the health benefits for eating fruits and vegetables and featuring students who are school leaders as veggie eaters- asking them to post supportive messages on their accounts. We can also do a campaign with parents to remind them to cook healthier meals. I'm sure if we get everyone excited about eating healthy and cooking healthy meals more students will eat more fruits and vegetables. We use social media all the time to encourage students and parents to get involved in other activities, like our bake sale—I am sure we can use it to encourage healthy eating, too! We have at least 100 parent followers on our Facebook page!

Jenna, Lunch Lady: Honorable Board members, most of our students get free or reduced school lunches every day. That means we provide 5 meals out of the 21 meals they eat a week — almost a quarter of their meals. If we can increase their fruit and vegetable intake at school we can do a lot for their health. We noticed that a majority of students have been throwing away the fruits or vegetables in the garbage can, or not even taking them on their lunch trays. Last year, we got a new salad bar, but no one ever goes to it. Almost all of our fruits and vegetables end up wasted each week. For the last two months, we decided to try an experiment to see if changing the layout of the lunch line and serving fruits and vegetables different could change the amount of fruits and vegetables students eat. We decided to offer fruits and vegetables cut up on little plates paired with healthy dips, and placed them at the front and end of the line. We created two types of prepackaged salads — garden greens and Chicken Cobb — so that students can grab and go. We noticed that less fruits and vegetables are thrown away each day, and that most of the grab and go salads are gone at the end of lunch! Some of the students have even told us that they like the change! We think that we can institute changes like these and more at all schools to make it easier for students to choice adding fruits and vegetables for their lunch.

Mark, president of the Good Eats club: Board of Education, not all students dislike eating fruits and vegetables. We at the Good Eats club are all about health and nutrition. There are a lot of take-out places, restaurants and fast food places that have healthy options. We wanted to develop an app that would tell you the healthier menu items to order at local restaurants, and how much they cost. That way if any student is out buying a quick bite, they could check the app to find the healthiest and cheapest meal. Students can also rate the meals so that other students are encouraged to try it. We are beta testing the app and a few students have tried using it. We just need more funding to fully develop it, so more students would use it and eat healthier!

Facilitator: Board of Education, what project idea do you think you will want to support and make happen based on the information provided? What criteria did you use to choose your solution?

Wrap it up:
For Step 4 of the CAM, your team will be working towards compelling a decision-maker to adopt or champion your PSE/Action Idea. Decision-makers typically want to know if your idea can work. That's where Demonstration Projects come in. Demonstration Projects shows that your PSE idea has potential at a small scale, support of people it effects, and innovative or newsworthy. This tactic can compel decision-makers to make the change you want to see.

Project Coordinator Tip:
If this introductory idea doesn't work for you, come up with another interactive way to demonstrate the idea of a Demonstration Project. The concept in this first part is that even a great idea might not actually be viable, it might work only in concept. Better to come up with a project that you can really show the practical, real nature of the Action.

Recipe for a Demonstration Project (10 mins)

- Prepare the 5 "ingredients" below on the board or a handout beforehand to ensure the ECLs have access to the rules of what makes a Demonstration Project.
- Set it Up: Like everything in life, there are rules. The below guidelines give an idea of what a good Demonstration Project will look like. In this activity, ECLs will learn what makes a Demonstration Project.

- Five main ingredients in a Demonstration Project:
    1. Trial version of your PSE change at a smaller scale
    2. Achievable
    3. Shows change through photos or description
    4. Short term: Lasts less than 2 months but happens more than just for a couple of hours
    5. Unique, disruptive, exciting, and/or newsworthy
- Have 5 volunteers read one of these each out loud from the board or their handout.
- Ask if there are any questions or if everyone understands the key ingredients to a Demonstration Project.

Stand up/ Sit Down: But is it really…? (25 mins)

- Purpose of the Activity: ECLs will test their knowledge of how to identify a good Demonstration Project.
- Set it up: PC write out these possible Demonstration Project ideas on separate pieces of paper:
    1. Set up a health fair about smoke-free housing
    2. Pass a city law to eliminate the sale of all cigarettes
    3. Tutor a group of 15 elementary school kids for 2 months
    4. Buy a store and only sell vegetables and healthy food there
    5. Have one school set up a program for students to get money for giving back the Juul or other e-cigs for the price they paid for them for 3 weeks
    6. Work with three local stores to get rid of all their tobacco signs on the windows for 2 months
    7. Have one landlord tell tenants smoking is not allowed for the month of December
    8. Convince 7–11 to stop selling flavored tobacco products in all of their stores nationally

- Post one of these ideas on the wall, asking the ECLs to review their rules about a Demonstration. Ask them to stand up if they believe the idea counts as a Demonstration Project or sit down if the disagree.
- Ask those who believe this is not a Demonstration Project to explain why.
- For the first one, go through the 4 criteria on their list and determine why the idea is/isn't a Demonstration Project.
- Continue to post the above ideas and have the ECLs stand up and sit down.
- You can organize and post all the valid ideas from the above list all together so that they can see examples of strong Demonstration Projects.

Project Coordinator Tip:
You are welcome to use the above 8 potential good/bad Demonstration Project ideas. You can also add your own. Additionally consider using another method than stand up/sit down. You can create a Kahoot game to quiz the ECLs or some other method of testing their application of the 5 ingredients of a Demonstration Project.

Wrap up (5 mins)

Purpose of the Activity: Spend a couple of minutes congratulating the ECLs on learning a new concept in this session and immediately applying what they learned. Tell them that now they have worked through what a Demonstration Project is, during the next workshop they will start brainstorming possible Demonstration Projects that will work for the focus of their work in CAM.

Workshop 5: Deciding on your Demonstration Project
(1 Hour)

Project Coordinator Prep:

- PC reviews findings from Workshop 4
- PC prepares a copy of the Demonstration Project ingredients and maintains several good examples of Demonstration Projects
- PC writes on the board the detailed top 2–3 Actions that were selected by the group as the possible ultimate goals to help the community long-term
- PC prepares a variety of potential Demonstration Projects that match the chosen Action
- Decide on an activity to use to facilitate group decision-making

Materials needed:

- Paper for idea generation process
- Post the flowchart that shows earlier Why discussions as a reminder of the overall project goals
- Markers
- Post-it Notes

Intro and Review (10–15 mins)

- **Review:**
    - Review what happened in the last workshop, the introduction a Demonstration Project.
    - Ask if the ECLs remember the ingredients of a Demonstration Project. Run through those 5 ingredients and post them on the wall for reference during the day.

    - Post the Demonstration Project ideas that the group decided were good ones on the wall again. Ask volunteers to read these and run through one or two checking off how it meets all 5 ingredients of a Demonstration Project.
    - Remind the group why their project is important because it leads to lasting changing in the community (their Action).

- **Share the Goal of today's workshop:** To plan a Demonstration Project, a brief example of how their potential Actions are likely to result in the change they are hoping to make in the community.

Brainstorm Activity: Spaghetti on the Wall (15 mins)

- **Purpose of the Activity:** Brainstorm all the possible Demonstration Projects that could help the ECL group show their Action concept is possible in real life!
- **As Project Coordinator, you have prepared a few sample Demonstration Project ideas in advance, u**se one as an example to get the group started. You can connect with TFP staff to support you in making sure you have a few in mind before undertaking this workshop. If they get stuck, pull out the other ideas you have prepared and see how they feel about them.
- **Set it up:** Remind the ECLs about their 2–3 selected potential Actions. Write them up on the board or print on a large sheet of paper. Give every ECL a stack of paper to write their Demonstration Project ideas.
- Ask each person to quickly write down any idea they can think off and wad it up, throw it into a basket or against the wall. Encourage them to be CREATIVE. This is the brainstorm process to do something that has all 5 ingredients of a great Demonstration Project.
- Try to come up with 12–15 ideas total, help coach the group toward a few ideas you have developed if needed.

Line ‘em up- Narrowing down to one Demonstration Project

(20 mins)

- Purpose of the Activity: Select the one Demonstration Project (or a few options) that makes the most sense, is practical and achievable, and will make a great case for why the Action should be adopted to help the community.
- PC can utilize any decision-making process that makes sense. Our suggestion is the following:
    - Post up all of the ECL-generated (and PC pre-developed) suggestions on the wall
    - Ask ECLs to read out the 5 ingredients of a successful Demonstration Project
    - Ask ECLs to then identify any Demonstration Projects that really don’t meet the criteria. Ask questions to the ECLs about how exciting the project sounds, whether they can imagine a photo of it, and whether it feels like a smaller version of the Actions they have chosen.
    - Once your team has Demonstration Projects that meet their criteria, then ask them to collectively line up the ideas from least effective/possible to most effective/possible based.
- Select the Demonstration Project that rises to the top and ask for consensus from the group to make sure the Demonstration Project idea is complete and write it out again.
- Brainstorm together the following additional details if needed:
    - How do you briefly describe the Demonstration Project idea?
    - When it will take place or for how long?
    - Where is the project located?
    - Who will it help?
    - How will your team share the Demonstration Project with the community?

- Plug the Demonstration Project into the Whys activity flowchart to show how the Demonstration Project can lead to the Action which breaks the chain.

Newsworthy (10 mins)

- **Purpose of this activity:** Think through the vision of your Demonstration Project. What could/should happen when the Demonstration Project is executed?
- **Set it up:** Now that we have developed a Demonstration Project idea with the 5 main ingredients, let's envision what we think is the outcome.
- **Small Group Activity:**
    - Break into 2–3 small groups
    - Tell the ECLs that a newspaper wants to report about their project.
    - Ask ECLs to write out the headline and sketch out the photo of what would appear in a newspaper or magazine about their project.
        - The headline should highlight what they envision as the outcome of the project
        - The image included could be a before and after drawing or a drawing that depicts the outcome.

Workshop 6: Planning Your Demonstration Project, Part 1
(2 Hour)

Project Coordinator Prep:

- PC reviews findings from Workshop 5: Deciding on a Demonstration Project
- PC reviews through Demonstration Project Plan Deliverable Document requirements

Materials needed:

- Previous workshop "Newsworthy" activity posters
- A recipe for Mac N Cheese
- Post-it notes in 3 colors
- Prepared large post-it papers with your team's Demonstration Project idea on it, paper's titled "Planning," "Doing" and "Checking"

Intro and Review (10–15 mins)

- **Share the Goal of today's workshop:** To develop the plan, timeline and roles for the Demonstration Project
- **Review the Previous Workshop:**
    - Review by asking ECLs to recall what happened in the last workshop- Deciding on a Demonstration Project. Post up the Demonstration Project idea & the newsworthy activity posters as a visual reminder.
    - Remind the group why their project is important because it leads to lasting changing in the community (their Action).

Identify 3 Phases in a Demonstration Project: Trying out a new recipe! (30 Mins)

- **Introduce the Activity:** Before we plan our Demonstration Project, let's get in a planning mode by coming up with the process of how to plan a group project. To do this, let's pretend that you and your friend want to try out a new recipe for mac n cheese that you found to bring to another friend's party tomorrow.
- **Pair Activity (5 minutes):** Ask ECLs to get into Pairs. Give ECLs 5 minutes to write out all the in order that they need to complete from reading the Mac n Cheese recipe, to making it, to bringing it to the party, and lastly deciding whether you want to make it again. Write each step onto sepa-rate post-it notes.

- **Group activity (10 Mins)**: Go around the room and ask ECL pair to share one step, starting with the first one. If another ECL pair already shares the step, then ask the ECL pair to share their next step. Post them up in order. Keep going around until all possible steps are posted. Then, ask the group to review the steps and reorder them if necessary.

Example of Mac n Cheese steps for PC reference:

- **Planning:** Read the recipe, read any reviews of the recipe for tips, decide on what each person will do, make sure you got enough $ for it, decide when and where you are going to make it, make sure you have the right cooking utensils and pots, buy all the ingredients, and etc.
- **Doing:** Follow the recipe, put the ingredients together, cook and bake it; bring it to the party with serving utensil, and eat it with guests.
- **Checking:** Try it and decide on whether you like the mac n cheese, ask guests what they think about the mac n cheese, bookmarking the recipe, considering how you might improve it next time- more cheese, taking an Instagram photo; and etc.

- **Planning, Doing & Checking (7 mins):** Explain that in most projects there are three phases: (1) planning, (2) doing and (3) checking. Discuss the following:
    - How would you define these three phases? Write down your team's definitions of planning, doing and checking on the flip chart paper.
    - How would you group the steps of making mac n' cheese into the three phases?
- **Discussion & Reflection (5 Mins)**: A Demonstration Project is like a group project. Can someone share about your experience in planning, doing and checking a group project such as planning a birthday party, a social outing, an English class assignment, etc. with your peers?

- What did you do in the planning, doing, and checking phases to make sure your project was a success?

Small Group Activity: Let's Get our Planning On! (1.25 Hour)

Purpose of Activity: To come up with the steps for the Planning & Doing Phase of the Demonstration Project

- **Remind ECLs of the objective of your team's Demonstration Project (10 Mins):**
    - Read them your team Demonstration Project idea and break down the main parts of the Demonstration Project for them. **For Example:** If your Demonstration Project eliminates tobacco and alcohol signage in two stores for 2 month, your team would need to: connect with some potential sites to get their agreement, assess what signage they have, pick a day to take signs down, plan a launch event, create an ECL schedule to check in that the signs are still down, take pics of the store before and after, etc.
- **Team Work (50 Mins):** The objective of this activity is to: 1) brainstorm as many tasks as possible that need to be done to complete the Demonstration Project and 2) get as detailed as possible about these tasks. Split ECLs into two teams in which they brainstorm all the small steps that need to be completed in order to plan, do, and check their Demonstration Project. You can even give a prize to the team that comes up with the most tasks.
    1. **Brainstorm time (20 Mins):** Give each group 20 minutes to create as many steps as they can think of. Ask them to write each step onto a separate post-it note. If it is helpful, you can even give them 3 different color post-its to categorize where the step is "Planning" "Doing" or "Checking."

2. **Ordering time (5 Mins):** Have the group line up the post-its in order that they think the activities need to go for 5 minutes.
3. **Presenting and Synthesizing time (20 Mins):** The full ECL group should reconvene. Each group should share their plan and steps. Then the PC should highlight any steps that are similar and different. The group can also discuss how to combine both plans into one draft plan if time.
4. **Prize time (1 Min):** Consider giving a prize to the group that successfully came up with the most number of steps.

The Wrap Up & Feedback (10 Mins):

- Thank all of the teams for their dedication to the project and putting their best planning efforts. Tell them you are taking notes from their work and will organize what they have developed into an official workplan that matches the calendar of their plan to do this work in January-February-March. Explain that next workshop will focus on refining and finalizing the Demonstration Project plan and adding an evaluation component.
- Ask for any reflections about what they learned through the workshop
- Invite ECLs to provide feedback through +/Delta or Bulls Eye Evaluation

Workshop 7: Planning Your Demonstration Project, Part 2
(2 Hours)

Project Coordinator Prep:

- PC reviews findings from Workshop 6: Planning Your Demonstration Project and creates a Gantt chart or calendar for all

PC prepare a large flip chart paper or PPT slide prior to workshop with Demonstration Project idea and main steps the tasks the ECLs identified (feel free to add more tasks they may have left out).

- PC reviews through Demonstration Project Plan Deliverable Document requirements to ensure you are getting all the information you need to complete the document

Materials needed:

- PC Finalized version of team's Planning Workshop timeline or calendar printed out for everyone and a large version for everyone to see
- Large poster labeled "Things We need for our Demonstration Project"
- 2 color Post-it notes & 2 color markers
- Budget Worksheet

INTRO AND REVIEW (10–15 mins)

PC prepare a large flip chart paper or PPT slide prior to workshop of Project timeline and plan developed from workshop 6 and individual print outs.

- **Share the Goal of today's workshop:** To develop the final plan, explore resources and budget for the Demonstration Project and start to think about who will do what part
- **Review the Previous Workshop:**
    - Review by asking ECLs to recall what happened in the last workshop: Planning Demonstration Project Part 1 and hand them the PC-developed timeline.
    - Ask each ECL team to share back one or two key steps in their Project Plan that was highlighted as strategic and demonstrated great planning.
    - Remind the group why their project is important because it leads to lasting changing in the community (their Action).

HOW WILL WE SPEND OUR $2K?! (50 Mins)

- **Explain the Budget (5 minutes):** Tell the ECLs that they have $2000 to spend on their Demonstration Project. Explain that any project will require using your existing resources and assets, such as graphic design skills or paper that your team already has. However, other parts of the project will require buying resources.
    - **For example:** If your Demonstration Project is removing signs from a store- you might need to create new signage for the store, give a stipend to the store owner, pay for a community kick off event, print photos of the before and after of the store, print a survey for customers to comment about how they like the store without advertisement.

> PC should research how much things may generally cost beforehand. PC can also consider only doing "Things We need for Our Demonstration Project" portion if developing a budget may be difficult for your ECLs

- **Things We Need for Our Demonstration Project (20 Mins):** Review the timeline with the group and ask the whole group to brainstorm a list of resources and materials needed for the project. Then go through the list and ask if the item is something that the team needs to buy. Mark these resources and materials with a $ sign.
- **Develop a Budget for the Project (20 minutes):** Break ECLs into small groups, let them know they have a real $2000 to spend on this Demonstration Project. Their goal is to come up with a budget that outlines the best way to use the funding and research how much everything would cost. To help them figure out how much everything cost, they could look things up online or the PC could do some pre-research for them. An example simple budget worksheet is on page 647.

- **Presentation: What would be the best use of the $2000 (10 mins):** Ask each of the groups to briefly present to the full group their budget idea. The best idea is how the funds will be used for your Demonstration Project. Consider awarding pretend money or an oversized check to the winning group!

TAKE A Stretch, BRAIN, OR FOOD BREAK!

The next part of the workshop could be a separate workshop

IDENTIFYING AND ASSIGNING ROLES (45 MINS)

- Last thing is to assign roles for the Demonstration Project! Prior to this activity, the PC should think about which ECLs would be best for each role based on their strengths and interests. PC should also spend some time thinking about which tasks would be for which role.

Role	In Charge of...
Project Manager (Lead ECL)	Making sure the team is following the plan by communicating and following up with team members about their tasks. Facilitate project team check-in time to share updates, troubleshoot and adjust the plan.
Documenters	Taking notes during team meetings and share with the team through email, google drive, or other means. Help document or collect data for evaluation activities through videos, photography etc.
Partnership	Communicate with stakeholders and partners about the Demonstration Project, to get them on board and ask them to participate.
Designers	Develop any graphic or creative materials: posters, signs, other materials
Logistics	Assist PC with ordering materials and budgets, and any other logistics in implementing the project
Evaluation	Coordinate the evaluation aspect of the Demonstration Project, including collecting the data, analyzing and create a 1–2 page report telling the story of the Demonstration Project

CREATE ROLES (10 Mins): Explain that each member of the team will have a unique role as well as pitching in to get each of the activities done.

- Write down the examples of role categories to get their ideas going. See above
- Ask if there are any other roles that may need to be created.
- Write the different names of the role on "Name Tags."

ASSIGN ROLES (10 mins): Invite ECL team members to volunteer to take on a unique role. Put the name tag with that role onto the ECL. If ECLs are hesitant to volunteer, PCs can make recommendations based on what you know about their strengths.

- Assign Tasks (15 Mins): Now that everyone has a role. Return to the larger print out of your Demonstration Project's gantt chart or project timeline. Ask ECLs to silently, individually review through the Project Plan poster and identify which activities they would be in charge of or participate in based on their role. Ask them to write it down on a piece of paper if needed.
    - Invite ECLs to then go around and introduce themselves and share with tasks they want to take on. As they share, write down their name on a separate post-it note and place that post-it next to the activity.
        - "My name is Derek and I am a documenter… I will be taking the lead on…or I will be helping out with…"
    - At the end, identify any activities that are not assigned, and ask for an ECL team member volunteer. Also identify activities that have multiple people working on it. You may also find that your team may need to create a new role.
- Partner Roles (10 Mins): Discuss what roles a main stakeholder or partner, like a storeowner or housing manger, would have in ensuring the success of your project. List together tasks that your key partner would need to do for your project to be successful.

DEVELOPING OUR CHECKING PHASE (30 Mins)

- Explain that the team will now have to develop the "Checking" part of the Demonstration Project.
- Ask ECLs to define the purpose of Checking.
    - Checking or Evaluation: To answer whether or not our Demonstration Project met the objective of showing that our Action idea can work on a larger scale.
- Share with the group a few ways to check/evaluate the project, or show its effectiveness:
    - Photograph or document the change through "Before" and "After"
    - Survey people who the project intended to reach to get their feedback or input
    - Interview or Debrief with stakeholders (ex. store owners, teachers, parents, etc.) who were involved in making it happen and ask for their feedback
    - Gather testimonials from people about the impact of the Demonstration Project
- Discuss as a group how your team will want to evaluate the Demonstration Project. Identify steps that need to be taken, and write them down on separate post-it notes. Place them onto your Demonstration Project's gantt chart or project timeline.

CAM Demonstration Project Budget

Items Needed	Cost	Subtotal

P-S-E Change Workshop Series for Project Coordinators

Overview

During Step 4: Select Action or Activity and Implement, CAM projects will use the data they collected and analyzed during Steps 2&3 in order to decide on an ACTION or a Policy-System-Environmental Change that can be a solution to the issue they've researched.

Goal of Workshop:

CAM Teams will identify 2–3 PSE Change Solutions (Action) that addresses their project issue & key findings. CAM Teams will develop a Demonstration Project idea that can demonstrate and visualize their proposed PSE Change Solution (Action) for Step 4 of the CAM Project. An Action should be achievable, sustainable and be able to compel a decision maker or a stakeholder to change the environment for the wellbeing of all.

Learning Objectives of the Workshop Series:

1. ECLs will be able to identify the underlying inequities and inequalities that contribute to larger problems that they researched in CAM Steps 1, 2, and 3
2. ECLs will be able to define what Policy-Systems-Environmental (PSE) Change Solutions (Actions), and identify several potential PSE Changes (Actions) that can work to address the underlying inequities and inequalities

Recommended Workshop Series for Setting up Step 4:

Pre-Workshop	Workshop 1	Workshop 2	Workshop 3
• PC reviews Key Findings from CAM Steps 1-3 with CAM Team • PC preapres conversation starters and notes potential answers	• CAM Team identifies root causes to their issue and key findings from Steps 1-3	• CAM Team undersatnds definition of a PSE, Action and Tactic	• CAM Team identifies 2-3 potential PSE Solutions (Actions) Funder Leadership will review CAM Teams' PSE ideas to assess viability and impact.

Pre-Workshop:

- Project Coordinator should familiarize themselves with the curriculum, terms used, and know the goal of this workshop series, and each individual workshop
- Project Coordinator should prepare conversation starters based on the CAM Team's research topic, and anticipated answers from the ECLs

Glossary of Terms:

Action: A Policy-System-Environmental change solution that addresses the issue and Area of Focus identified in CAM Step 1–3. The Action must be achievable and compel decision-makers to make long-term/ sustainable change to Policies, Systems or Environments (places people live) for the wellbeing of all community residents. An "Action" is also referred to as a "Policy-Systems-Environment Change" throughout this document.

Tactic: An educational intervention that can lead up to, and support an Action, which are generated through the Midwest Academy Strategy chart. Tactics are how you will use your power to compel your decision-maker

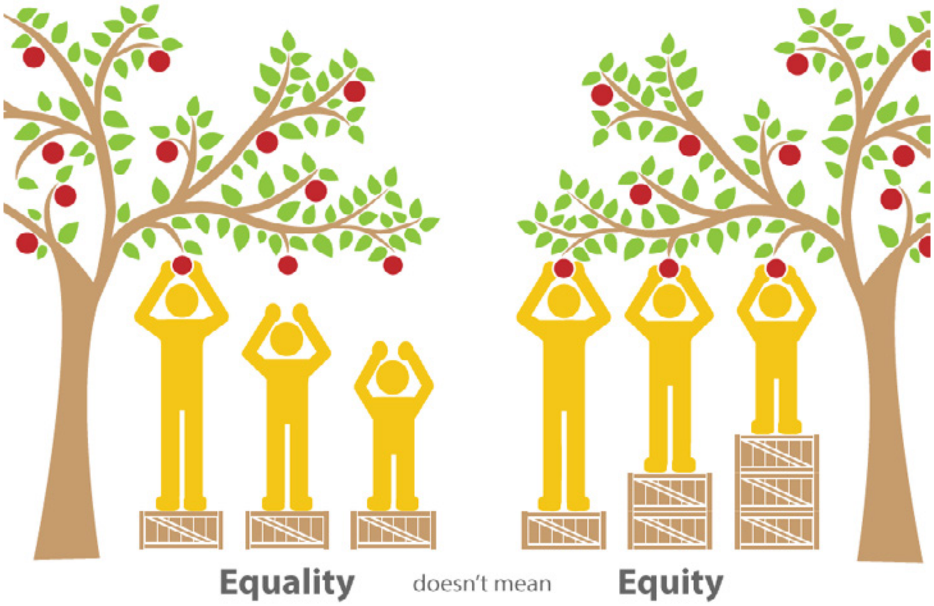
Policy Change: Change to a written statement of organizational position, decision or course of action (example: local ordinance, state law, guidelines, mandates, etc.)

Systems Change: Changes in organizational procedures (example: ways resources or staff are used, programs available, etc.)

Environmental Change: Physical, observable changes in the built, economic or social environment (example: streets and bike lanes, partnerships, funding allocations)

Demonstration Project: A short term project that shows stakeholders and decision-makers that a selected Action can address your health issue at a smaller scale. A Demonstration Project is one of the tactics that lead up to your Action.

Health Equity: Everyone should have a fair opportunity to attain their full potential, and no one should be disadvantaged from achieving this potential



P-S-E Change Workshop Series Project Coordinator Guide

Workshop 1:
The 5 Whys of Health Inequities (1 Hour)

Project Coordinator Prep:

- PC reviews findings from CAM Steps 1–3 with CAM Team
- PC prepares conversation starters and notes potential answers

Materials needed:

- Large white board or several sheets of flip chart paper to visualize discussion
- Markers

INTRODUCTION AND REVIEW (20 mins)

- **Review:**
    - The CAM Team's chosen issue/ problem statement,
    - Any relevant background information or data that was gathered in CAM Steps 1–3
- **Share the Goal of today's workshop:**
    - CAM Team identifies the root cause of your team's Key Findings from Step 1–3

ASK 5 WHYS (30 mins)

- **Purpose of the Activity** is for ECLs to critically analyze the causes of their Key Findings from CAM Step 1–3, arriving at larger societal issues.

- **Start with 1 Key Finding**: Start on the far left side of a flip chart paper or white board and write out the one of the Key Findings that your team identified in CAM Steps 1–3.
- **Example**: San Francisco residents surveyed say that it is easier to buy grape flavored tobacco products than grapes in their neighborhood.
- **Start Discussion:** PC asks the ECLs "Why do you think this is the case?" and writes down their answers on the flip chart/ white board to the right of the original finding. Encourage ECLs to think of reasons that do not focus on individual responsibility and behavior.
    - **Example Answers:** Because they are cheaper for the store to buy; because they are easier for the store to keep in storage – they don't go bad like produce; because more customers want to buy grape tobacco than grapes; because the store makes more money from tobacco, than produce.

Project Coordinator Tip:

Thinking through potential answers ahead of time will help you if the ECLs are stuck at the beginning and you need to share an example. Have a few suggestions ready to help start the process, and to be able to re-direct the group away from answers that place the blame or the responsibility on the individual (for example: customers don't want healthy foods)

- **5 Whys:** Once ECLs identified a few reasons, ask them "Why do you think *that's* the case?" four more times, for a total of 5 "Why"s, writing the ideas on the flip chart/ white board in a horizontal line (you will use the vertical space below in a later workshop. See the example on page 654). By the 5th Why, the ECLs will likely identify larger societal issues such as racism, sexism, income inequality, and other forms of discrimination that are ultimately creating problems in their communities.

- **Ask 5 Whys for 2 More Key Findings:** Do this exercise again with the other 2 key findings from Step 1–3 OR again with the same Key finding your team just did. This way you will have a lot of “Reasons Why” or societal issues to identify PSE solutions for in the next workshop. **At the end you will have 3 flowcharts to work with for the next workshops.**

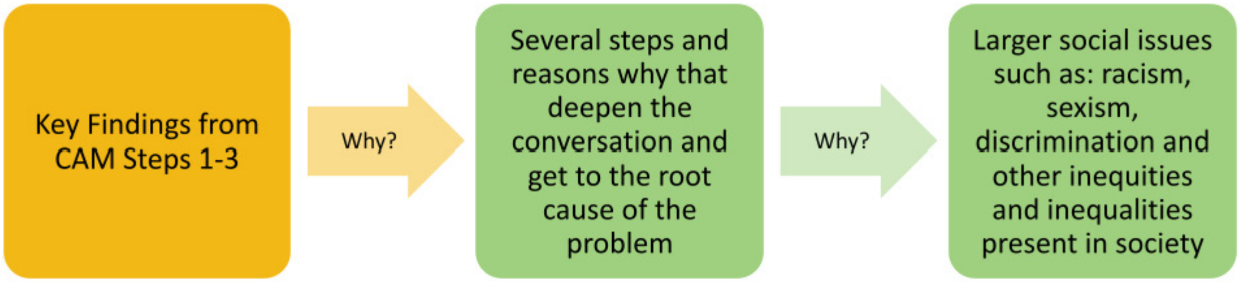
Project Coordinator Tip: MIX IT UP

Use a different format to generate “WHYs” for the next two Key Findings!

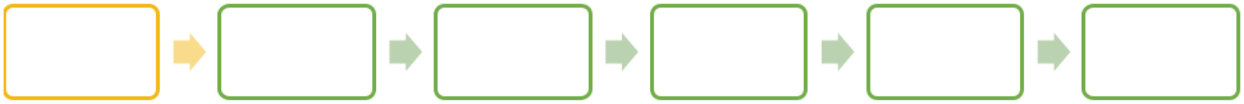
- Cut slips of paper, enough for each of your ECLs
- Write numbers 1 through 5; one on each slip, leaving the rest of the slips blank
- Fold the papers, and put them in a hat or in your hand
- Ask ECLs to pick a piece of paper to find out the order they will go in response to “Why”
- State the Key Finding, then ask “Why” to the ECL with slip #1
- Then ask “Why” to the ECL with Slip #2…
- Keep going until 5 Whys are asked

REFLECT ON THE FINDINGS (10 mins):

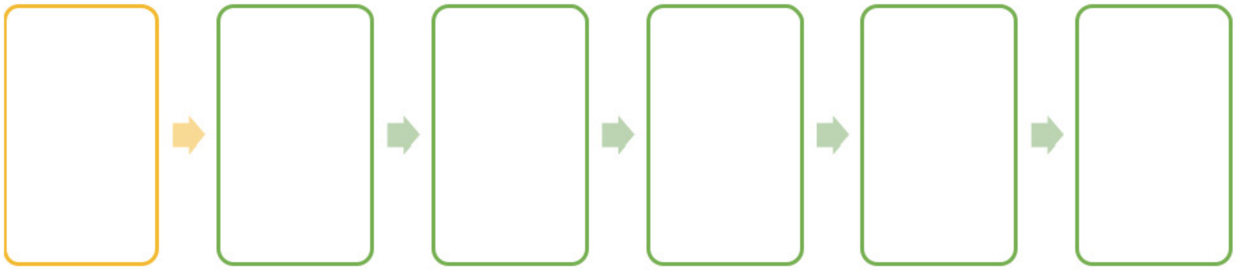
Discuss with your team how larger social issues and inequities shape the lives of communities and individuals, and create health inequities and health disparities. Bring back tools used in CAM Step 1 to discuss social justice, public health, and health disparity themes, if needed.



Example set up:



Example for one Key Finding:



Workshop 2:
What is P-S-E Change (Action)

(1.5 Hour)

Project Coordinator Prep:

- PC reviews findings from Workshop 1
- PC prepares potential answers

Materials needed:

- Notes from previous discussion on flip chart, or re-written on white board
- Markers
- Flip Chart with definitions of PSE, Action and Tactic
- Action vs Tactic Game

INTRODUCTION & REVIEW (5–10 mins)

Review:

- Ask ECLs what key information they remembered from the last workshop
- Any relevant background information or data that was gathered in CAM Steps 1–3
- **Share the Goal of today's workshop:**
    - Define Policy-System-Environment Change (Action)
    - Understand difference between Action and Tactic

POLICY-SYSTEM- ENVIRONMENTAL CHANGE (25 mins)

- **Purpose of the Activity** is for ECLs to have their own working definition of Policy System and Environmental Change

SET IT UP (5 Minutes)

Last workshop we looked critically at why our CAM issue exists using the 5 WHYs activity, and saw that larger societal issues like racism or capitalism are at the root cause of why it is harder for certain communities to have healthy lives. For decades, community leaders have stepped up and spoken up to address these deeply rooted societal issues. However, given our limited time and resources, our CAM project is going to look at identifying a solution that addresses a "Why" that is further up from the root cause. This solution would be a Policy, System or Environmental change that could disrupt the status quo, or the way things are now.

DEFINE POLICY-SYSTEM-ENVIRONMENTAL CHANGE (10 Minutes)

Write out the definition of each on separate flip charts:

- **Policy Change =** Change to a written statement of organizational position, decision or course of action (example: local ordinance, state law, guidelines, etc.)
- **Example:** San Francisco ordinance to end the sale of flavored and menthol tobacco products
- **Systems Change =** Changes in organizational procedures (example: ways resources or staff are used, programs available, etc.)
- **Example:** High school wellness center have new program for peer support group for students to stop using e-cigarettes/ Juuls.
- **Environmental Change =** Physical, observable changes in the built, economic or social environment (example: streets and bike lanes, partnerships, funding allocations)
- **Example:** Tobacco stores take down all advertisement for flavored tobacco products
    - Invite an ECL to read out loud the definition and example
    - Check for understanding by asking ECLs to provide 1–2 more examples of each for your specific topic

EVERYDAY PSES CHANGES (20 minutes)

- Write on separate flip chart the word “Policy” “System” and “Environment”
- Explain to ECLs that you will be creating your own definition for PSE
- Break into three groups, assigning each group either “Policy” “System” and “Environment” and give them these directions: Take 7 minutes to come up with:
    - **3 words or phrases** to define “policy” “system” or “environment”
    - **Examples:** Policy (law, rules, ordinance); System (organizations structures); Environmental Change (what is seen)
    - **Write 1 example** of an existing good “policy” “system” or “environment” that improves or benefits their everyday life
    - **Example:** Policy- Speeding laws; Systems (Funding for arts program at school); environment (new bike lanes)
    - **1 drawing of a “Before” and “After” picture** of what life was like before the “policy” “system” or “environment” change and what it is like after
- Ask groups to present back their definition and examples (2 minutes each)

ACTION/PSE OR TACTIC (15 Minutes)

Purpose of the Activity is for ECLs to know the difference between Action and Tactic.

- **Set it Up (2 Minutes)**
    - In Step 4 of the Community Action Model (CAM), we will be choosing an Action that will address our problem statement/issue. An “Action” is a Policy-System-Environmental change.

CAM Action = PSE (Policy-System-Environmental) Change

- To achieve our Action/PSE Change, our team will develop an Action Plan with a series of tactics that will educate and mobilize stakeholders to support the Action/PSE change. Tactics are how our team builds and uses our power so that we can pressure a decision-maker to champion and adopt our PSE Change solution.
- In order to identify our project's Action/PSE change we need to differentiate between an Action and a tactic. In the second part of this workshop, we'll get a better understanding the difference between an Action and a Tactic.

- **Give Definition & Examples: (3 minutes) Write these on flip chart paper**
  - **Action is a** Policy-System-Environmental change solution that addresses the issue and Area of Focus identified in CAM Step 1–3. The Action must be achievable and compels decision-makers to make long-term/ sustainable change to Policies, Systems or Environments (places people live) for the wellbeing of all community residents.
  - **Tactic** is an educational intervention that can lead up to, and support an Action. Tactics are how we use and build our power to compel our decision-maker to champion or adopt our PSE/Action solution.
  - **Tactics can be used in two ways:**
    - Tactics are used to mobilize community members and stakeholders to support your PSE/Action through informing them about the issue and your proposed solution (Presentations with community groups, media, educational packets, etc.). These types of tactics build our power and our confidence.
    - Other tactics are used to directly compel or pressure your decision-maker to champion and adopt your PSE/Action. (Ex. Demonstration Projects, elevating the issue in the media, and visits with decision-makers)

- **Action or Tactic Game (10 Minutes)**
    - Check for ECL understanding of the difference between Action and Tactic through a fun game! Have at least 10 examples of Actions and Tactics for ECL team to decide whether it is an Action or Tactic.
    - **Example of Action vs Tactic Game:**
        - Ask ECLs to stand in a line facing you
        - Tell ECLs that you will read a scenario out loud, and then on the count of three will ask the ECLs to step forward if they think the scenario is an Action or step backward if they think the scenario is a tactic
        - Read each scenario out loud. Count to three.
        - If a lot of ECLs had difficulty choosing the correct term, review through the scenario and definitions.
    - **Example scenarios for Action vs. Tactic Game:**
        - Your group gets the Recreation and Park Commission to adopt a "no smoking" policy in outdoor playground areas
        - Your group organizes community presentations, community events, and educates an elected official about smoke-free housing
        - Your group writes a letter to the weekly newspaper requesting they adopt a policy to not accept tobacco ads
        - Your group decides to hold a press conference to announce the findings of your diagnosis
        - Your group gets BART to prohibit smoking and vaping in all BART trains and stations
        - Your group does a 3 week social media campaign to educate smokers about the environmental impact of cigarette waste
        - Your group holds a health fair to educate community members about the dangers of tobacco use

- **Wrap Up: (2 mins):** Now that we know we all have a solid understanding of an Action/PSE and tactic. Next week, we will come up with potential Actions for our project based on our 5 Why Activityfrom the previous week.

Workshop 3: Select Your CAM Action

(1.5 Hours)

Project Coordinator Prep:

- PC reviews findings from Workshops 1–2
- PC prepares potential answers
- Decide on an activity to use to facilitate group decision-making

Materials needed:

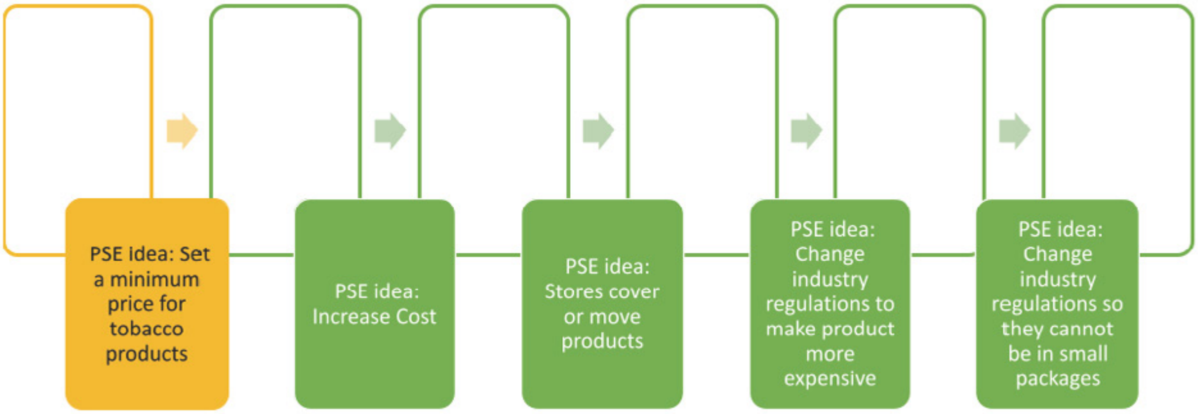
- Notes from previous discussion on flip chart, or re-written on white board
- Flip chart with definitions of PSE/Action and Tactic
- Markers
- Post-it Notes

INTRODUCTION & REVIEW (5–7 Minutes)

- **Review:**
  - Ask ECLs what key information they remembered from the last workshop
  - Present and review the results of their 5 WHY workshop
- **Share the Goal of today's workshop:**
  - Identify potential Actions that can address a reason why your team's CAM issue exists
  - Select 2–3 Actions that your team is most excited about

SET IT UP (10 Minutes)

- Project Coordinator should post up the flipcharts from Workshop 1: 5 Whys activity and the definition of a PSE/Action.
- *Now that we have a solid understanding of an Action, it's time to brainstorm potential Actions for us to choose for our CAM project. To do so, we will revisit the activity we completed during the 5 Whys workshop two weeks ago.*
- Ask ECLs to recall what they learned from the Why Activity



DISRUPT THE CHAIN! SMALL GROUP BRAINSTORMING PSES

(20 Minutes)

Purpose of the Activity

For ECLs to identify as many potential Actions as possible that will address your teams CAM Issue.

Rules to the Game:

- Assign a Key Finding-5 Whys flowchart/diagram to pairs or trios of ECLs that was developed in Workshop 1.
- Ask each team to write as many post-it notes ideas of Policy-System-Environmental Changes or Actions that could be a solution for each "Whys" aka disrupt the chain! *Acknowledge that the CAM team may not*

be able to achieve some of the PSE solutions your group comes up with, but it is helpful exercise to brainstorm as many possible solutions.

- Tell them that the team that comes up with the most PSE/Action ideas gets a prize!
- After 10 minutes is up, ask each team to present back to the group their PSE/Action ideas and identify if the solution is a Policy, System or Environmental change.
- PC will ask the rest of the team if any of the proposed PSEs are actually tactics. Mark these as "Tactic" on the post it note. Acknowledge that these are great ideas for the tactics that can be used in Step 4. Ask someone to write them down or record them.
- PC will then assign each team points based on the number of actual PSE/Action ideas.

NARROWING DOWN TO 2–3 POSSIBLE ACTIONS (30 Minutes)

- **Review through the criteria of an Action (5 Minutes):** achievable by the CAM team; long-term/sustainable; and compels another entity to change the environment for the wellbeing of all
- **Make sure your CAM Action meets criteria (5–7 Minutes):** Ask ECLs to identify any PSE solution ideas that do not fit the criteria of a CAM Action. Mark those post-it notes or fold them up.

> **PC Coordinator Tip:** Glance through the all the proposed Actions and identify which ones do not meet criteria, specifically those that are not achievable and do not compel a decision-making body. Consider whether the items that don't suffice as Actions may be tactics that can support the project.

- **Group similar Actions (5 Minutes):** Ask ECLS to see if there are any similar PSE solutions among the 3–4 flowchart diagrams. If there are, these solutions could potentially address many of the issues your team identified in CAM Step 1–3. Group these potential Action ideas together.

- Narrowing down to 2–3 Actions **(15–20 Minutes):** After using the Action criteria and grouping similar ideas, your team may have more than 2–3 Actions to choose from. Facilitate your team in **identifying 2–3 Actions** through any or some of these activities:
- Identify and use your team's criteria to narrow down options, for example: store-related, addresses health inequities for our community, feasibility
- Discuss and predict what ideal outcome your team thinks would happen as result of the Action/PSE. Choose Actions that have the most exciting and valuable impact based on discussion.
- Pro and Con list for each of the remaining Action/PSE ideas

WRAP UP AND LOOK FORWARD TO WORKSHOP 4: DEMONSTRATION PROJECT

- Congratulate your CAM team on identifying 2–3 potential ACTIONs for your CAM project for Step 4! They have also some tactic ideas that can be used too.
- Explain that their Action ideas will now be submitted and reviewed by TFP and DPH leadership. They will be bringing their knowledge of best practices and political environment to identify which Action idea is the most achievable for your team to Demonstrate.
- After our team's Action idea is finalized, we will then develop a Demonstration Project as part of the tactics in Step 4. In the next workshop, they find out what a Demonstration Project entails and come up with ideas of Demonstration Projects for one Action they came up with in Workshop 3.

PC Coordinator Tip: Give at least 2-3 weeks between Workshop 3 and 4 for TFP and DPH leadership to review the Action ideas. Make sure to include some time in the next workshop to discuss outcome of TFP/DPH leadership review.

Workshop 4:
Defining a Demonstration Project (1 Hour)

INTRODUCTION AND REVIEW (5–10 mins)

Review:

- Review the steps so far- we identified our issue, brainstormed the things that cause that issue, came up with a lot of possible Actions to fix the issue, and decided our top 2–3 Action ideas.
- Remind the group that they are working smart by really thinking through the issue. They uncovered many causes and many possible solutions. Then they picked the most reasonable solution ideas that could help their community!
- Root the Step 4 work they are doing in a reminder of why this work is important. In Steps 1–3 they did a lot of work collecting information and key finding about why this issue is important to San Franciscans.

Share the Goal of today's workshop: To learn about Demonstration Projects- a tactic that is a brief example of how their Action idea can likely result in the change they are hoping to make

ROLE PLAY ACTIVITY (15 mins)

- **Purpose of the Activity:** Highlight importance of showing decision-makers the feasibility of a solution to gain their support.
- **Set it Up:** Decision-makers are leaders in an agency, organization or government that can make a change in how things are done. During Step 4, you want to compel a decision-maker to champion and support your Action/PSE idea to address your issue.

Facilitator: In this role play, some of you will be playing the role of a decision-making body — the Board of Education. The Board of Education learned that 43% of the high school students do not eat the recommended 2 cups of fruits and 2 cups of vegetables each day. For students who go to the schools in neighborhood that don't have access to affordable fresh produce, 66% of students say they don't eat the recommend amount of fruits and vegetables. The majority of the students qualify for reduced lunch, which means that they are from low-income families. The Board of Education is trying to find a way to address this issue, and have asked for proposed solutions.

Board of Education: Wow, we are upset by the fact that so many of our students are not able to eat healthy, and many of them are at risk for diabetes even at a young age. We must do something at our schools to encourage our students to eat more fruits and vegetables!

Some teachers, staff, parents and students have come up with ideas to improve the health of our students so that they can learn and thrive! We hope that their ideas are not just focused on changing someone's behavior (like teaching them the facts about nutrition). We are looking for a solution that changes the way things are done at schools that will encourage people to eat healthy. Let's see what ideas people came up with.

First up…

Annie, Economics Teacher: Board of Education, it's all about creating a supply of fruits and vegetables so that the students will then demand it. I say we provide free fruits and vegetable snacks for everyone during first period so that everyone will eat it. I did the cost analysis for this and in the end the cost for us to provide daily fruits and vegetables for all students for the whole school year will save the city tens and thousands of dollars on medical costs. The long term benefits outweigh the short term costs.

David, PTA parent chair: Board Members, our children need to be encouraged to eat more fruits and vegetables. Let's create a semester-long social media campaign, using Instagram and SnapChat, promoting the health benefits for eating fruits and vegetables and featuring students who are school leaders as veggie eaters- asking them to post supportive messages on their accounts. We can also do a campaign with parents to remind them to cook healthier meals. I'm sure if we get everyone excited about eating healthy and cooking healthy meals more students will eat more fruits and vegetables. We use social media all the time to encourage students and parents to get involved in other activities, like our bake sale—I am sure we can use it to encourage healthy eating, too! We have at least 100 parent followers on our Facebook page!

Jenna, Lunch Lady: Honorable Board members, most of our students get free or reduced school lunches every day. That means we provide 5 meals out of the 21 meals they eat a week—almost a quarter of their meals. If we can increase their fruit and vegetable intake at school we can do a lot for their health. We noticed that a majority of students have been throwing away the fruits or vegetables in the garbage can, or not even taking them on their lunch trays. Last year, we got a new salad bar, but no one ever goes to it. Almost all of our fruits and vegetables end up wasted each week. For the last two months, we decided to try an experiment to see if changing the layout of the lunch line and serving fruits and vegetables different could change the amount of fruits and vegetables students eat. We decided to offer fruits and vegetables cut up on little plates paired with healthy dips, and placed them at the front and end of the line. We created two types of prepackaged salads—garden greens and Chicken Cobb—so that students can grab and go. We noticed that less fruits and vegetables are thrown away each day, and that most of the grab and go salads are gone at the end of lunch! Some of the students have even told us that they like the change! We think that we can institute changes like these and more at all schools to make it easier for students to choice adding fruits and vegetables for their lunch.

Mark, president of the Good Eats club: Board of Education, not all students dislike eating fruits and vegetables. We at the Good Eats club are all about health and nutrition. There are a lot of take-out places, restaurants and fast food places that have healthy options. We wanted to develop an app that would tell you the healthier menu items to order at local restaurants, and how much they cost. That way if any student is out buying a quick bite, they could check the app to find the healthiest and cheapest meal. Students can also rate the meals so that other students are encouraged to try it. We are beta testing the app and a few students have tried using it. We just need more funding to fully develop it, so more students would use it and eat healthier!

Facilitator: Board of Education, what project idea do you think you will want to support and make happen based on the information provided? What criteria did you use to choose your solution?

Wrap it up:
For Step 4 of the CAM, your team will be working towards compelling a decision-maker to adopt or champion your PSE/Action Idea. Decision-makers typically want to know if your idea can work. That's where Demonstration Projects come in. Demonstration Projects shows that your PSE idea has potential at a small scale, support of people it effects, and innovative or newsworthy. This tactic can compel decision-makers to make the change you want to see.

Project Coordinator Tip:

If this introductory idea doesn't work for you, come up with another interactive way to demonstrate the idea of a Demonstration Project. The concept in this first part is that even a great idea might not actually be viable, it might work only in concept. Better to come up with a project that you can really show the practical, real nature of the Action.

RECIPE FOR A DEMONSTRATION PROJECT (10 mins)

- Prepare the 5 “ingredients” below on the board or a handout beforehand to ensure the ECLs have access to the rules of what makes a Demonstration Project.
- **Set it Up:** Like everything in life, there are rules. The below guidelines give an idea of what a good Demonstration Project will look like. In this activity, ECLs will learn what makes a Demonstration Project**.**

Five main ingredients in a Demonstration Project:

1. Trial version of your PSE change at a smaller scale
2. Achievable
3. Shows change through photos or description
4. Short term: Lasts less than 2 months but happens more than just for a couple of hours
5. Unique, disruptive, exciting, and/or newsworthy
    - Have 5 volunteers read one of these each out loud from the board or their handout.
    - Ask if there are any questions or if everyone understands the key ingredients to a Demonstration Project.

STAND UP/ SIT DOWN: BUT IS IT REALLY…? (25 mins)

- **Purpose of the Activity:** ECLs will test their knowledge of how to identify a good Demonstration Project.
- **Set it up**: PC write out these possible Demonstration Project ideas on separate pieces of paper:
    1. Set up a health fair about smoke-free housing
    2. Pass a city law to eliminate the sale of all cigarettes
    3. Tutor a group of 15 elementary school kids for 2 months
    4. Buy a store and only sell vegetables and healthy food there

5. Have one school set up a program for students to get money for giving back the Juul or other e-cigs for the price they paid for them for 3 weeks
6. Work with three local stores to get rid of all their tobacco signs on the windows for 2 months
7. Have one landlord tell tenants smoking is not allowed for the month of December

Convince 7-Eleven to stop selling flavored tobacco products in all of their stores nationally

- Post one of these ideas on the wall, asking the ECLs to review their rules about a Demonstration. Ask them to stand up if they believe the idea counts as a Demonstration Project or sit down if the disagree.
- Ask those who believe this is not a Demonstration Project to explain why.
- For the first one, go through the 4 criteria on their list and determine why the idea is/isn't a Demonstration Project.
- Continue to post the above ideas and have the ECLs stand up and sit down.
- You can organize and post all the valid ideas from the above list all together so that they can see examples of strong Demonstration Projects.

WRAP UP (5 mins)

Purpose of the Activity: Spend a couple of minutes congratulating the ECLs on learning a new concept in this session and immediately applying what they learned. Tell them that now they have worked through what a Demonstration Project is, during the next workshop they will start brainstorming possible Demonstration Projects that will work for the focus of their work in CAM.

Workshop 5:
Deciding on your Demonstration Project (1 Hour)

Project Coordinator Prep:

- PC reviews findings from Workshop 4
- PC prepares a copy of the Demonstration Project ingredients and maintains several good examples of Demonstration Projects
- PC writes on the board the detailed top 2–3 Actions that were selected by the group as the possible ultimate goals to help the community long-term
- PC prepares a variety of potential Demonstration Projects that match the chosen Action
- Decide on an activity to use to facilitate group decision-making

Materials needed:

- Paper for idea generation process
- Post the flowchart that shows earlier Why discussions as a reminder of the overall project goals
- Markers
- Post-it Notes

INTRO AND REVIEW (10–15 mins)

Review:

- Review what happened in the last workshop — the introduction a Demonstration Project.
- Ask if the ECLs remember the ingredients of a Demonstration Project. Run through those 5 ingredients and post them on the wall for reference during the day.

- Post the Demonstration Project ideas that the group decided were good ones on the wall again. Ask volunteers to read these and run through one or two checking off how it meets all 5 ingredients of a Demonstration Project.
- Remind the group why their project is important because it leads to lasting changing in the community (their Action).

Share the Goal of today's workshop:

- To plan a Demonstration Project- a brief example of how their potential Actions are likely to result in the change they are hoping to make in the community.

BRAINSTORM ACTIVITY: SPAGHETTI ON THE WALL (15 mins)

- **Purpose of the Activity:** Brainstorm all the possible Demonstration Projects that could help the ECL group show their Action concept is possible in real life!
- **As Project Coordinator, you have prepared a few sample Demonstration Project ideas in advance**, use one as an example to get the group started. You can connect with TFP staff to support you in making sure you have a few in mind before undertaking this workshop. If they get stuck, pull out the other ideas you have prepared and see how they feel about them.
- **Set it up:** Remind the ECLs about their 2–3 selected potential Actions. Write them up on the board or print on a large sheet of paper. Give every ECL a stack of paper to write their Demonstration Project ideas.
- Ask each person to quickly write down any idea they can think off and wad it up, throw it into a basket or against the wall. Encourage them to be CREATIVE. This is the brainstorm process to do something that has all 5 ingredients of a great Demonstration Project.
- Try to come up with 12–15 ideas total, help coach the group toward a few ideas you have developed if needed.

LINE 'EM UP: NARROWING DOWN TO ONE DEMONSTRATION PROJECT

(20 mins)

Purpose of the Activity: Select the one Demonstration Project (or a few options) that makes the most sense, is practical and achievable, and will make a great case for why the Action should be adopted to help the community**.**

- **PC can utilize any decision-making process that makes sense.** Our suggestion is the following:
    - Post up all of the ECL-generated (and PC pre-developed) suggestions on the wall
    - Ask ECLs to read out the 5 ingredients of a successful Demonstration Project
    - Ask ECLs to then identify any Demonstration Projects that really don't meet the criteria. Ask questions to the ECLs about how exciting the project sounds, whether they can imagine a photo of it, and whether it feels like a smaller version of the Actions they have chosen.
    - Once your team has Demonstration Projects that meet their criteria, then ask them to collectively line up the ideas from least effective/ possible to most effective/possible based.
- **Select the Demonstration Project** that rises to the top and ask for consensus from the group to make sure the Demonstration Project idea is complete and write it out again.
- **Brainstorm** together the following additional details if needed:
    - How do you briefly describe the Demonstration Project idea?
    - When it will take place or for how long?
    - Where is the project located?
    - Who will it help?
    - How will your team share the Demonstration Project with the community?
- Plug the Demonstration Project into the Whys activity flowchart to show how the Demonstration Project can lead to the Action which breaks the chain.

NEWSWORTHY (10 mins)

Purpose of this activity: Think through the vision of your Demonstration Project. What could/should happen when the Demonstration Project is executed?

- **Set it up:** Now that we have developed a Demonstration Project idea with the 5 main ingredients, let's envision what we think is the outcome.
- **Small Group Activity:**
    - Break into 2–3 small groups
    - Tell the ECLs that a newspaper wants to report about their project.
    - Ask ECLs to write out the headline and sketch out the photo of what would appear in a newspaper or magazine about their project.
        - The headline should highlight what they envision as the outcome of the project
        - The image included could be a before and after drawing or a drawing that depicts the outcome.

Workshop 6: Planning your Demonstration Project, Part 1 (2 Hour)

Project Coordinator Prep:

- PC reviews findings from Workshop 5: Deciding on a Demonstration Project
- PC reviews through Demonstration Project Plan Deliverable Document requirements

Materials needed:

- Previous workshop "Newsworthy" activity posters
- A recipe for Mac N Cheese
- Post-it notes in 3 colors
- Prepared large post-it papers with your team's Demonstration Project idea on it, paper's titled "Planning," "Doing" and "Checking"

INTRO AND REVIEW (10–15 mins)

Share the Goal of today's workshop: To develop the plan, timeline & roles for the Demonstration Project

Review the Previous Workshop:

- Review by asking ECLs to recall what happened in the last workshop-Deciding on a Demonstration Project. Post up the Demonstration Project idea & the newsworthy activity posters as a visual reminder.
- Remind the group why their project is important because it leads to lasting changing in the community (their Action).

IDENTIFY 3 PHASES IN A DEMONSTRATION PROJECT: TRYING OUT A NEW RECIPE! (30 Mins)

Introduce the Activity: Before we plan our Demonstration Project, let's get in a planning mode by coming up with the process of how to plan a group project. To do this, let's pretend that you and your friend want to try out a new recipe for mac n cheese that you found to bring to another friend's party tomorrow.

PAIR ACTIVITY (5 minutes)

Ask ECLs to get into Pairs. Give ECLs 5 minutes to write out all the in order that they need to complete from reading the Mac n Cheese recipe, to making it, to bringing it to the party, and lastly deciding whether you want to make it again. Write each step onto separate post-it notes.

Example of Mac n Cheese steps for PC reference:

- **Planning:** Read the recipe, read any reviews of the recipe for tips, decide on what each person will do, make sure you got enough $ for it, decide when and where you are going to make it, make sure you have the right cooking utensils and pots, buy all the ingredients, and etc.
- **Doing:** Follow the recipe, put the ingredients together, cook and bake it; bring it to the party with serving utensil, and eat it with guests.
- **Checking:** Try it and decide on whether you like the mac n cheese, ask guests what they think about the mac n cheese, bookmarking the recipe, considering how you might improve it next time- more cheese, taking an Instagram photo; and etc.

GROUP ACTIVITY (10 Mins)

Go around the room and ask ECL pair to share one step, starting with the first one. If another ECL pair already shares the step, then ask the ECL pair to share their next step. Post them up in order. Keep going around until all possible steps are posted. Then, ask the group to review the steps and reorder them if necessary.

PLANNING, DOING & CHECKING (7 mins):

Explain that in most projects there are three phases: (1) planning, (2) doing and (3) checking. Discuss the following:

- How would you define these three phases? Write down your team's definitions of planning, doing and checking on the flip chart paper.
- How would you group the steps of making mac n' cheese into the three phases?

DISCUSSION & REFLECTION (5 Mins):

A Demonstration Project is like a group project. Can someone share about your experience in planning, doing and checking a group project such as planning a birthday party, a social outing, an English class assignment, etc. with your peers?

- What did you do in the planning, doing, and checking phases to make sure your project was a success?

SMALL GROUP ACTIVITY- LET'S GET OUR PLANNING ON! (1.25 Hour)

Purpose of Activity: To come up with the steps for the Planning & Doing Phase of the Demonstration Project.

- Remind ECLs of the objective of your team's Demonstration Project (10 Mins):
- Read them your team Demonstration Project idea and break down the main parts of the Demonstration Project for them. For Example: If your Demonstration Project eliminates tobacco and alcohol signage in two stores for 2 month, your team would need to: connect with some potential sites to get their agreement, assess what signage they have, pick a day to take signs down, plan a launch event, create an ECL schedule to check in that the signs are still down, take pics of the store before and after, etc.

PC prepare a large flip chart paper or PPT slide prior to workshop with Demonstration Project idea and main steps.

TEAM WORK (50 Mins)

The objective of this activity is to: 1) brainstorm as many tasks as possible that need to be done to complete the Demonstration Project and 2) get as detailed as possible about these tasks. Split ECLs into two teams in which they brainstorm all the small steps that need to be completed in order to plan, do, and check their Demonstration Project. You can even give a prize to the team that comes up with the most tasks.

- **BRAINSTORM TIME** (20 Mins): Give each group 20 minutes to create as many steps as they can think of. Ask them to write each step onto a separate post-it note. If it is helpful, you can even give them 3 different color post-its to categorize where the step is "Planning" "Doing" or "Checking."
- **ORDERING** time (5 Mins): Have the group line up the post-its in order that they think the activities need to go for 5 minutes.
- **PRESENTING AND SYNTHESIZING TIME** (20 Mins): The full ECL group should reconvene. Each group should share their plan and steps. Then the PC should highlight any steps that are similar and different. The group can also discuss how to combine both plans into one draft plan if time.
- **PRIZE TIME** (1 Min): Consider giving a prize to the group that successfully came up with the most number of steps.

THE WRAP UP & FEEDBACK (10 Mins)

- Thank all of the teams for their dedication to the project and putting their best planning efforts. Tell them you are taking notes from their work and will organize what they have developed into an official workplan that matches the calendar of their plan to do this work in January-February-March. Explain that next workshop will focus on refining and finalizing the Demonstration Project plan and adding an evaluation component.
- Ask for any reflections about what they learned through the workshop
- Invite ECLs to provide feedback through +/Delta or Bulls Eye Evaluation

Workshop 7: Planning Your Demonstration Project-Part 2 (2 Hour)

Project Coordinator Prep:

- PC reviews findings from Workshop 6: Planning Your Demonstration Project and creates a Gantt chart or calendar for all the tasks the ECLs identified (feel free to add more tasks they may have left out).
- PC reviews through Demonstration Project Plan Deliverable Document requirements to ensure you are getting all the information you need to complete the document

Materials needed:

- PC Finalized version of team's Planning Workshop timeline or calendar printed out for everyone and a large version for everyone to see
- Large poster labeled "Things We need for our Demonstration Project"
- 2 color Post-it notes & 2 color markers
- Budget Worksheet

INTRO AND REVIEW (10–15 mins)

- **Share the Goal** of today's workshop: To develop the final plan, explore resources and budget for the Demonstration Project and start to think about who will do what part
- **Review the Previous Workshop:**
    - Review by asking ECLs to recall what happened in the last workshop- Planning Demonstration Project Part 1 and hand them the PC-developed timeline.

PC prepare a large flip chart paper or PPT slide prior to workshop of Project timeline and plan developed from workshop 6 and individual print outs

- Ask each ECL team to share back one or two key steps in their Project Plan that was highlighted as strategic and demonstrated great planning.
- Remind the group why their project is important because it leads to lasting changing in the community (their Action).

HOW WILL WE SPEND OUR $2K?! (50 Mins)

PC should research how much things may generally cost beforehand. PC can also consider only doing "Things We need for Our Demonstration Project" portion if developing a budget may be difficult for your ECLs

- **EXPLAIN THE BUDGET** (5 minutes): Tell the ECLs that they have $2000 to spend on their Demonstration Project. Explain that any project will require using your existing resources and assets, such as graphic design skills or paper that your team already has. However, other parts of the project will require buying resources.
  - **For example:** if your Demonstration Project is removing signs from a store- you might need to create new signage for the store, give a stipend to the store owner, pay for a community kick off event, print photos of the before and after of the store, print a survey for customers to comment about how they like the store without advertisement.
- **THINGS WE NEED FOR OUR DEMONSTRATION PROJECT** (20 Mins): Review the timeline with the group and ask the whole group to brainstorm a list of resources and materials needed for the project. Then go through the list and ask if the item is something that the team needs to buy. Mark these resources and materials with a $ sign.
- **DEVELOP A BUDGET FOR THE PROJECT** (20 minutes) Break ECLs into small groups, let them know they have a real $2000 to spend on this Demonstration Project. Their goal is to come up with a budget that outlines the best way to use the funding and research how much everything

would cost. To help them figure out how much everything cost, they could look things up online or the PC could do some pre-research for them. An example simple budget worksheet is on page 685.

- **PRESENTATION: WHAT WOULD BE THE BEST USE OF THE $2000** (10 mins): Ask each of the groups to briefly present to the full group their budget idea. The best idea is how the funds will be used for your Demonstration Project. Consider awarding pretend money or an over-sized check to the winning group!

TAKE A STRETCH, BRAIN, OR FOOD BREAK

The next part of the workshop could be a separate workshop or you can

IDENTIFYING AND ASSIGNING ROLES (45 Mins)

Last thing is to assign roles for the Demonstration Project! Prior to this activity, the PC should think about which ECLs would be best for each role based on their strengths and interests. PC should also spend some time thinking about which tasks would be for which role.

Role	Responsibilities
Project Manager (Lead ECL)	Making sure the team is following the plan by communicating and following up with team members about their tasks. Facilitate project team check-in time to share updates, troubleshoot and adjust the plan.
Documenters	Taking notes during team meetings and share with the team through email, google drive, or other means. Help document or collect data for evaluation activities through videos, photography etc.
Partnership	Communicate with stakeholders and partners about the Demonstration Project, to get them on board and ask them to participate.
Designers	Develop any graphic or creative materials: posters, signs, other materials
Logistics	Assist PC with ordering materials and budgets, and any other logistics in implementing the project
Evaluation	Coordinate the evaluation aspect of the Demonstration Project, including collecting the data, analyzing and create a 1–2 page report telling the story of the Demonstration Project

- **CREATE ROLES** (10 mins): Explain that each member of the team will have a unique role as well as pitching in to get each of the activities done.
  - Write down the examples of role categories to get their ideas going. See above
  - Ask if there are any other roles that may need to be created.
  - Write the different names of the role on “Name Tags.”
- **ASSIGN ROLES** (10 mins): Invite ECL team members to volunteer to take on a unique role. Put the name tag with that role onto the ECL. If ECLs are hesitant to volunteer, PCs can make recommendations based on what you know about their strengths.
- **ASSIGN TASKS** (15 mins): Now that everyone has a role. Return to the larger print out of your Demonstration Project’s gantt chart or project

timeline. Ask ECLs to silently, individually review through the Project Plan poster and identify which activities they would be in charge of or participate in based on their role. Ask them to write it down on a piece of paper if needed.

- Invite ECLs to then go around and introduce themselves and share with tasks they want to take on. As they share, write down their name on a separate post-it note and place that post-it next to the activity.
    - "My name is Derek and I am a documenter… I will be taking the lead on…or I will be helping out with…"
- At the end, identify any activities that are not assigned, and ask for an ECL team member volunteer. Also identify activities that have multiple people working on it. You may also find that your team may need to create a new role.

- **PARTNER ROLES** (10 min): Discuss what roles a main stakeholder or partner, like a storeowner or housing manger, would have in ensuring the success of your project. List together tasks that your key partner would need to do for your project to be successful.

DEVELOPING OUR CHECKING PHASE (30 Mins)

- Explain that the team will now have to develop the "Checking" part of the Demonstration Project.
- Ask ECLs to define the purpose of Checking. Checking or Evaluation: To answer whether or not our Demonstration Project met the objective of showing that our Action idea can work on a larger scale.
- Share with the group a few ways to check/evaluate the project, or show its effectiveness:
    - Photograph or document the change through "Before" and "After"
    - Survey people who the project intended to reach to get their feedback or input

  - Interview or Debrief with stakeholders (ex. store owners, teachers, parents, etc.) who were involved in making it happen and ask for their feedback
  - Gather testimonials from people about the impact of the Demonstration Project
- Discuss as a group how your team will want to evaluate the Demonstration Project. Identify steps that need to be taken, and write them down on separate post-it notes. Place them onto your Demonstration Project's gantt chart or project timeline.

FINAL PLAN REVIEW & WRAP UP (30 Mins)

Review through the final plan and congratulate the team on being engaged in this planning process.

- **ASK THE GROUP TO DISCUSS THE FOLLOWING** (15 mins)**:**
  1. What steps or activities in your plan are crucial? As in, if the step isn't complete then the Demonstration Project will not move forward. (PC should place a star or mark those steps.)
  2. What challenges or barriers do you think your team may face? What will you do to overcome it?
  3. What help or support do you need from the SFDPH TFP team?

- **PAIR-SHARE: REFLECT ON THE DEMONSTRATION PROJECT PLANNING PROCESS.** (10 Mins)
  - What did you learn from the planning process?
  - What was a success for you and your team in this process?
  - What was challenging for you in this process?

- **Feedback (Optional):** Invite the ECLs to complete a +/Delta or Bullseye for evaluating the workshop

Demonstration Project Budget

Item Needed	Cost	Sub Total
Example: Print 100 11 X18 posters	*$100*	*$100*
Example: Community kick off event food for 30 people	*$300*	*$400*
Total Amount:		

Step 5: Maintain & Enforce the Action

Step 5 Terms:

- **Policy-System-Environmental Change (PSE)**: Unlike traditional public health interventions, PSE change focuses on addressing social, political, environmental structures that influence health rather than individual knowledge or behavior.
  - **Policy Change:** Change to a written statement of organizational position, decision or course of action (example: local ordinance, state law, guidelines, mandates, etc.)
  - **Systems Change:** Changes in organizational procedures (example: ways resources or staff are used, programs available, etc.)
  - **Environmental Change:** Physical, observable changes in the built, economic or social environment (example: streets and bike lanes, partnerships, physical changes to stores or buildings).
- **Action:** The CAM term for a Policy-System-Environmental change solution that addresses the focus issue identified in Steps One to Step Three. An Action should be achievable, sustainable, and should compel a Decision-Maker or a stakeholder to modify the way things work for the wellbeing of the community.
- **Enforce:** Compel observance or compliance with the Policy-System-Environmental change.

Step Overview

Ideally, at the end of Step 4, the Emerging Community Leaders (ECLs) and their Project Coordinator (PC) successfully strategized and built their power through various Tactics to pressure their Decision-Maker to institutionalize their Action. They achieved their Action or Policy-System-Environmental (PSE) change! This may look like a City Council Member introducing and passing an ordinance that funds and legalizes a needle exchange program. Or it could be the Board of Education amending the school district wellness policy to include a higher rate of school social workers per student population. Or, it might be the Planning Department reprioritizing their safe streets plan to focus first in low-income, high density neighborhoods to increase active transportation rather than the more affluent and more vocal areas.

A PSE change is only effective in improving the health of the community if it is implemented, maintained and continually enforced. During Step 4, ECLs should have engaged and discussed with key stakeholders and their Decision-Maker to identify the entities that would implement and enforce their proposed PSE change. It is unlikely that the ECLs themselves would formally implement and enforce the change. In Step 5, they can keep this entity accountable by developing their own plan to monitor and enforce the change. In the case of the needle exchange program, they could check the city's budget to see if it is being funded, be provided reports on the progress and success of the program, and/or make sure that needle exchange sites are physically being established and advertised. If they find that the implementation and enforcement of their change is not in place, then they can engage and inform the key Decision-Maker and other stakeholders to enforce the Action. Emerging Community Leaders may also want to be part of the implementation of their Action. In the case of the safe street plan, ECLs may engage and educate their community members in designing their active transportation plan through town halls and neighborhood association meetings with the Planning Department. As part of Step 5, PCs should report on their plan for maintaining and enforcing their Action in the Final Report.

What if an Action is not achieved?

Not all projects achieve their proposed Action. Their initial proposed Action can change based on stakeholder feedback, and political will. Sometimes, CAM teams simply run out of time in the grant to complete their plan. Changes in leadership of the institution or governing body that the CAM team is trying to compel can happen during the course of the CAM project and can greatly impact the Action Plan implementation. Decision-Makers may offer another PSE change or ask that the group consider another Tactic like a town hall or engagement with other stakeholders, etc. before a PSE change is considered. Sometimes, a similar PSE change may be in the works elsewhere that team didn't know about and it will be up to the CAM group and the Funding Agency to determine how to best proceed with flexibility and keeping in mind the goal of improving public health. Similarly, the Project Coordinators or ECLs may transition during Step 4 which can impact the momentum and continuity of the project. All of these factors influence the outcome of the CAM Project and are outside of the control of the Funding Agency, Community-Based Organization (CBO) and their Project Coordinators and Emerging Community Leaders. San Francisco Tobacco-Free Project has consistently made it clear that funding is tied to the achievement of the workplan deliverables and not whether the proposed PSE was achieved. This helps allay the concerns of the PC, the ECLs and their CBO.

Further discussions about sustainability of the CAM project beyond the grant cycle are crucial. Projects can honor and continue the work of the ECL teams even if an Action is not achieved. Project Coordinators and their ECL team should discuss and identify who needs to be informed about their work, how they can package and close out the project and who might carry on the work and build upon it. The team may also determine that they want to continue to build support and momentum for their Action and engage new Decision-Makers. Ultimately, at the end of the 2-year cycle, all CAM projects should discuss and report on how they would ensure that the issue continues to be addressed beyond their team's efforts.

Maintaining Community Leadership

It is important to remember that there are two goals of CAM: (1) to train and build capacity of Emerging Community Leaders and (2) to create Policy-System-Environmental change to improve health of the community. Therefore, the

Funding Agency ought to value both goals, and put more emphasis on the former than the latter because the Project Coordinators have more control over achieving it. Funding Agencies can support Project Coordinators by re-emphasizing their success in the ways they have trained and supported their Emerging Community Leader team throughout the CAM cycle. Project Coordinators can identify and develop a plan with each Emerging Community Leader on how they will continue to cultivate and grow their leadership skills and attain their personal goals. For example, Project Coordinators can help ECLs identify the skills they learned through this program and incorporate those skills into their resume. Or they can help ECLs identify opportunities to continue to develop their skills through internships, jobs and education. In the past, we have seen Emerging Community Leaders get hired at their Community-Based Organization as Project Coordinators or other staff. In San Francisco, Emerging Community Leader alumni continue to be involved in civic engagement and leadership, and some have become elected officials themselves!

End of the Year Celebration

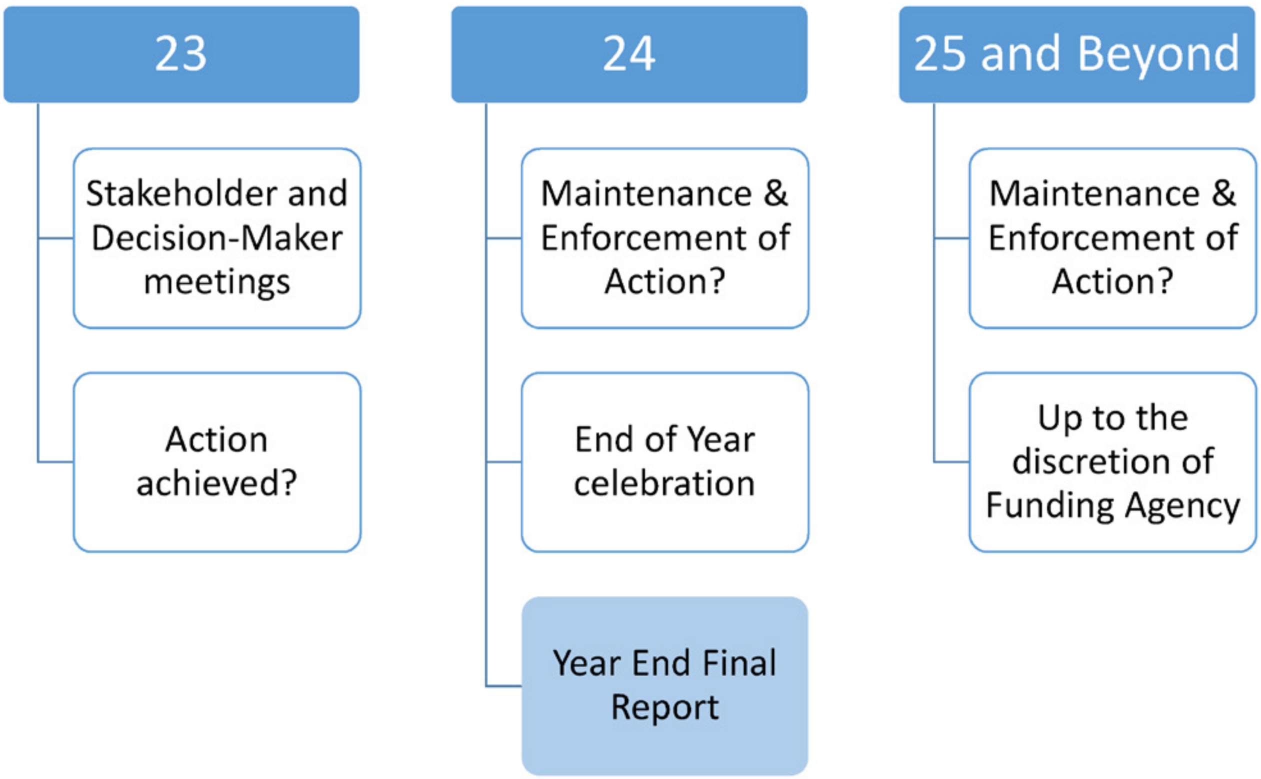
At the end of the 2-year CAM cycle, we throw a party to celebrate the accomplishments of the Project Coordinators and their Emerging Community Leaders! Regardless of whether an Action is achieved, each CAM project is recognized for their persistence, progress and growth as community leaders. As with the Showcase, we invite the Project Coordinators to help plan this event to make sure it is celebratory and fun for the Emerging Community Leaders as well as showcasing their work over the 2 years. Typically, we provide food, prizes, and music along with each team presenting or displaying their project. Reference the Step 3 description of the CAM Showcase for best practices.

Funding CAM Projects Beyond 2 Years

Funding Agencies can consider funding CBOs beyond the two years of the CAM cycle to either continue to build power and pressure a Decision-Maker to champion their Action and/or to maintain and enforce their Action. A no cost extension or an additional year of funding can be applied to support Emerging Community Leaders in continuing the momentum of their project or ensuring that their Action becomes reality. If Funding Agencies fund some CBOs to start the CAM at Step 1 and others to do continuation projects beyond 2 years, timelines and best practices for supporting groups at different points in the process can be complex but may be manageable with good planning.

Time Frame

Month 23–24 out of 24



Deliverables

2nd Year Final Report- This final report includes the CAM project’s monitoring and enforcement plan for both goals of the CAM: the PSE change and capacity building of ECLs. Project Coordinators are asked to report on their successes and key challenges in achieving the Action through their tactics. Project Coordinators are also asked to reflect on how they have seen themselves and their ECLs grow in leadership throughout the last year. Lastly, as with all progress reports, PCs are asked to share any feedback on how to improve the program, training and technical assistance.

Trainings by Funding Agency

For Project Coordinators:	For Emerging Community Leaders
• Defining and reflecting on success of CAM project • Defining monitoring and enforcement of CAM project	

Recommended Trainings for ECLs conducted by Project Coordinators

- Defining and identifying monitoring and enforcement for CAM project
- Defining sustainability and identifying ways to sustain CAM project
- Defining and reflecting on success of CAM Project
- Identifying next steps for leadership development and goals

Step Five Strategies

1. **Identify and engage with stakeholders who may implement and enforce the Action to discuss the enforcement process for an Action in Step 4.** Project Coordinators and their Emerging Community Leaders should begin discussing who would implement and enforce their proposed Action early on in Step 4. They can engage these entities in their stakeholder meetings to get a clearer understanding of how their Action may be implemented and enforced as well as assess any concerns they may have. From these conversations, the Emerging Community Leaders and the Project Coordinator may even make changes to their Actions so that it is more grounded and realistic. Having researched and come up with a general idea of how their Action would be implemented and enforced

will also prepare them to talk about it or answer questions from their Decision-Maker.

2. **Focus on maintaining both goals of the CAM: the Action and the capacity building of Emerging Community Leaders.** The Community Action Model has two goals: building capacity of Emerging Community Leaders and creating Policy-System-Environmental change. At the end of the two-year CAM cycle, it is important to emphasize both CAM goals in Step 5 — not just the Action. Funding Agencies can support Project Coordinators in developing a plan to sustain their work in both aspects of the CAM project. Project Coordinators and Emerging Community Leaders can identify which key stakeholder can carry on the work they are doing, or other ways to gain resources to keep building power and engaging a Decision-Maker for their Action. Project Coordinators can also support their ECLs in identifying how they can continue to build their skills as community leaders.
3. **Celebrate the success of the CAM Projects- the Project Coordinators and the Emerging Community Leaders — for completing all steps of the CAM!** Regardless of whether an Action is achieved, they have continued to engage in this two-year, five-step process and developed new skills, relationships, and experiences that will continue to steward and utilize to improve the health of their community. Funding Agencies can celebrate the success of the CAM projects in by hosting an end of year event, certificates, or in other ways. They can also provide practical support to ECLs and PCs by writing letters of recommendation or act as references for higher education or career opportunities. Funding Agencies should also encourage the CBOs to recognize the accomplishments of the ECLs.

Glossary of Terms

A

Action: Policy-System-Environmental change solution that addresses the issue and Area of Focus identified in Steps One to Step Three. An Action should be achievable, sustainable, and be able to compel a decision-maker or a stakeholder to change the environment for the wellbeing of all.

C

Community Action Model (CAM): A five-step, community-driven model designed to build communities' capacity to address health disparities through mobilization.

Community-Based Organization (CBO): Nonprofit groups that work at a local level to improve life for residents.

Community Diagnosis: Conducting primary and secondary research to explore and understand the problem/issue

D

Decision-Maker: A key person who has the power to institute a change in Policy-Systems-Environment. This person is usually either in charge of a body or organization, an elected official, someone with control over funding allocation or a person who owns and can modify a resource, building, or location. Examples include an elected councilmember, the director of a budget committee, the owner of a business or Executive Director of a non-profit organization, the leader of a faith community, or some other person with institutional power.

E

Educational Packet: A packet of documents, such as fact sheets, position papers, data visualizations, reports, endorsement forms, etc. that can be used to educate stakeholders and decision-makers about the CAM project's issue and solution.

The packet succinctly summarizes the campaign work but also demonstrates their power by showing the amount of support for the solution.

Emerging Community Leader (ECL): community leaders who are willing and available to engage and be trained to complete the 5 steps of the CAM.

Enforce: Compel observance or compliance with the Policy-System-Environmental change.

Environmental Change: Physical, observable changes in the built, economic or social environment (example: streets and bike lanes, partnerships, funding allocations) that improve the lives of all community members and/or improve equity.

F

Funding Agency: Agency that funds and coordinates trainings and convenings for the Community Action Model program's Community-Based Organizations.

K

Key Findings: Findings from community-led research in Step 2 that are most important, or salient, to the ECLs. Key Findings tend shed light on the impact the issue has on their community, the multi-level factors that contribute to it, and community recommendations or support on solutions.

M

Midwest Academy Strategy Chart (MASC): A tool developed by the Midwest Academy to help campaigns analyze power and develop a strategy and plan to compel a decision-maker to create the change they want to see.

P

Participatory Action Research: Community members take the lead in designing, conducting and analyzing research on their community issue, leading towards action to create sustainable change for the community. Researchers or other experts provide skill building training, technical assistance and support in the process, but community members should ultimately be the drivers and owners of the research, findings and the solutions.

Policy Change: Change to a written statement of organizational position, decision or course of action (example: local ordinance, state law, guidelines, mandates, etc.).

Policy-system-environmental change (PSE): Unlike traditional public health interventions, PSE change focuses on addressing social, political, environmental structures that influence health rather than individual knowledge or behavior.

Popular Education: Method and philosophy of education that holds oppressed people at the center of the learning process. It's an educational pedagogy in which participants and educators are co-learners who critically reflect on issues of equity in their community and take action to change them.

Primary Research: Conducting research that gathers first-hand data from others about the issue.

Problem Statement: CAM teams describes in their own words the health issue they've chosen to work on and why it matters to them (Step Two).

Project Coordinator (PC): Dedicated staff person from the Community-Based Organization that recruits, trains and supports the Emerging Community Leader team in completing the five steps of the CAM.

Q

Qualitative Research: Research that observes and gathers non-numerical, such as words, images, maps, and diagrams, to gain deeper understanding, insight to a problem. Data is typically gathered through focus groups, interviews, photovoice, community mapping and other methods.

Quantitative Research: Research that gathers numerical and measurable data gathered through surveys, pools, etc. and conducts statistical or numerical analysis of the data.

S

Scaffolding: training and education methods to provide temporary support for CAM participants (PCs and ECLs) to reach the next level of proficiency in their leadership skills.

Secondary Research: Examining and analyzing research and data that has already been compiled, reported and published by others about the issue.

Stakeholder: Someone or a group that is directly impacted, either positively/negatively, by the proposed Action OR has a role to play in the Action. They may hold influence and power over the change or those who can make the change, but not be the direct decision-maker.

Systems Change: Changes in organizational procedures (example: ways resources or staff are used, programs available, etc.).

T

Tactic: The CAM term for an educational intervention that can lead up to and support an Action. These are generated through the planning process outlined in the Midwest Academy Strategy chart. Tactics are how you will use your power to compel your decision-maker. Tactics are sometimes also referred to as Activities.

Train the Trainer: Funder provides training/curriculum to the Project Coordinators to guide them in training their ECLs.

W

Workshops: Weekly meetings and/or trainings for the ECLs convened, facilitated and coordinated by their CBO's Project Coordinator.