

# Commitment to Healthy Communities

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Evaluation Framework



**CUNY SCHOOL OF PUBLIC HEALTH**

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## Introduction

### Introduction

#### **Welcome to the Commitment to Healthy Communities Evaluation Framework!**

This is a unique research partnership between the Healthy Weight Commitment Foundation (HWCF) and the City University of New York School of Public Health (CUNY SPH) with a strong mandate from the HWCF member company CEOs.

The Commitment to Healthy Communities Evaluation Framework inventories and assesses healthful eating and active living strategies and programs aimed at preventing or reducing obesity and food insecurity in the United States. The framework will evaluate the impact of obesity and hunger-related strategies and programs to help companies maximize the potential of their investments and improve healthful eating, active living initiatives. The goal is to identify and share best practices in community health and leverage industry dollars for greatest impact.

#### **About the Commitment to Healthy Communities Evaluation Framework**

Using this online platform, the Evaluation Framework collects information on companies' approaches as well as on individual healthful eating, active living programs through indicators and questions based on industry benchmarking practices and concepts around collective impact. Throughout the Evaluation Framework, hunger and food access programs are categorized as healthful eating programs because having enough food and having access to food are critical (though not sufficient) components of healthful eating.

Because understanding the quality of a company's investment in obesity prevention and food security goes beyond evaluating individual programs, two of the surveys, the Company Inventory and the Company Strategy and Governance Assessment, focus on the company's overarching strategy for healthful eating, active living initiatives.

- The Company Inventory will capture descriptive information about the company's overarching healthful eating, active living strategy.
- The Company Strategy and Governance Assessment survey will use a range of scored indicators in four domains to evaluate the company's overall strategic direction, governance and performance of its healthful eating, active living initiatives.

The Program Inventory and the Program Strategy and Governance Assessment evaluate individual programs through a similar process.

- The Program Inventory will capture descriptive information about each program, as well as information on the program's inputs, activities, outputs and outcomes. The Program Inventory will catalogue each program's work and provide an understanding of the program's content and delivery.
- The Program Strategy and Governance Assessment will use scored indicators from four similar domains, as in the Company Assessment, to evaluate individual program's strategy, governance and performance.
- Separate Program Inventory and Program Strategy and Governance Assessment surveys will be completed for each of the company's healthful eating, active living programs.

#### **Using the Commitment to Healthy Communities Evaluation Framework**

## Introduction

Let's get started!

Each survey contains a range of questions related to your company's or programs' approach to healthful eating and/or active living. The survey focuses solely on domestic strategies and programs occurring in calendar year 2014 or the most recent fiscal year (e.g. mid-2014 to mid-2015). The survey asks quantitative and qualitative information at company and program levels across several domains including:

- Design, objectives and strategy
- Governance, management structures and resources
- Monitoring and evaluation
- Reporting, communication and stakeholder engagement

Questions can be answered in any order and you can save your work and come back to the surveys at any time. The surveys include several types of questions such as drop down menus, multiple choice questions, check all that apply or text boxes for open-ended responses. Many questions include an "Explanatory Note," indicated by a grey box marked "i," which provide definitions or additional information to help answer the corresponding question. To bookmark your place in the survey, you can select "Flag this Indicator" and you will be able to see which section has been flagged on the survey home page. This will make it easy for you to return to where you have left off.

It may be helpful to gather company and program resources such as annual reports, corporate social responsibility reports, staff job descriptions or program updates and evaluations before you get started.

After the data collection period (July 20- September 11), 50 percent of the participating companies will be randomly selected for an audit to verify company survey responses against actual documentation. As you answer the survey, you have the option to upload documents or URLs which provide supporting evidence for your answers. Although this step is not required to complete the survey, we encourage you to upload evidentiary documentation as you go along to save time in the event that your company is randomly selected to participate in the audit.

## Scoring

Based on responses to the Company and Program Strategy and Governance Assessment surveys, companies will receive an overall score using the following process. The Company Inventory and Program Inventory surveys are not scored.

1. To calculate a company's overall score, the Company Strategy and Governance Assessment score and overall Program Strategy and Governance Assessment score will each be weighted at 50 percent.
2. For the Company Strategy and Governance Assessment score, the monitoring and evaluation section will be weighted at 40 percent and the other three sections (design, objectives and strategy; governance, management structures and resources; and reporting, communication and stakeholder engagement) will each be weighted at 20 percent, as shown below in Table 1. For select questions in the monitoring and evaluation section, a multiplier of 2 will be applied to the indicator

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score if the evidence provided by programs is derived from an independent evaluation.

**Table 1. Company Strategy and Governance Assessment Summary**

Section	What it evaluates	Number of indicators	Total points	Section weight
<b>1</b>	<b>Design, objectives &amp; strategy</b>	<b>18</b>	<b>190</b>	<b>20%</b>
	Strategy design and alignment	3		
	Strategic plan and objectives	10		
	Strategy scope and reach	5		
<b>2</b>	<b>Governance, management structures &amp; resources</b>	<b>9</b>	<b>90</b>	<b>20%</b>
	Governance and leadership	4		
	Management structures and resources	5		
<b>3</b>	<b>Monitoring &amp; evaluation</b>	<b>17</b>	<b>220</b>	<b>40%</b>
	Monitoring	10		
	Evaluation	7		
<b>4</b>	<b>Reporting, communication &amp; stakeholder engagement</b>	<b>8</b>	<b>80</b>	<b>20%</b>
	Reporting	3		
	Communication	3		
	Stakeholder engagement	2		
	<b>Total scores</b>	<b>52</b>	<b>580</b>	<b>100%</b>

- For each individual Program Strategy and Governance Assessment scores, sections will be weighted in a similar manner. The monitoring and evaluation section will be weighted at 40 percent and the other three sections (design, objectives and strategy; governance, management, resources and reinforcing activities; and reporting, communication and stakeholder engagement) will each be weighted at 20 percent, as shown below in Table 2. For highlighted questions in the monitoring and evaluation section, a multiplier of 2 will be applied to the indicator score if the evidence provided by programs is derived from an independent evaluation.
- To account for unequal investments, the overall Program Strategy and Governance Assessment score will be a weighted average of the individual program scores based on the relative dollar amount invested in a program by the company.

**Table 2. Program Strategy and Governance Assessment Summary**

Section	What it evaluates	Number of indicators	Total points	Section weight
<b>1</b>	<b>Design, strategy &amp; objectives</b>	<b>25</b>	<b>260</b>	<b>20%</b>
	Program design and alignment	5		
	Program objectives, strategy and plan	15		
	Program scope and reach	5		
<b>2</b>	<b>Governance, management, resources &amp; reinforcing activities</b>	<b>17</b>	<b>170</b>	<b>20%</b>
	Management	10		
	Resources	4		
	Reinforcing activities and coordination of activities	3		
<b>3</b>	<b>Monitoring &amp; evaluation</b>	<b>21</b>	<b>270</b>	<b>40%</b>

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	Monitoring Evaluation	7 14		
<b>4</b>	<b>Reporting, communication &amp; stakeholder engagement</b>	<b>7</b>	<b>70</b>	<b>20%</b>
	Reporting Communication Stakeholder engagement	2 2 3		
	<b>Total scores</b>	<b>70</b>	<b>770</b>	<b>100%</b>

## Project Outputs

Based on findings from the Evaluation Framework surveys, HWCF will produce an aggregate industry report.

Each company will also receive a private scorecard based on the Company and Program Strategy and Governance Assessment scores. The scorecard will include commentary on each domain area, program strengths and areas for improvement.

The company scorecards as well as indicator-level information will be confidential and will not be made publicly available.

### Contact Box:

For questions on the online platform or survey items, please contact Emily Ferris at [Emily.Ferris@sph.cuny.edu](mailto:Emily.Ferris@sph.cuny.edu).

### FAQ:

1. What if my company or program does not collect or have information for a particular question?

Answer: Some questions may not be applicable to all companies or programs. And some companies and programs may not collect information for all of the survey indicators. That's okay! In the Company and Program Inventory surveys, where appropriate, questions have an option to check "not available" or "no comment." Many of the questions in the Company and Program Strategy and Governance Assessment surveys have "no" as an option and have comment boxes to allow you to include any information not captured in the question.

2. The instructions state that all data should be from the previous calendar year 2014 or the most recent fiscal year (e.g. mid-2014 to mid-2015). What if my company or program collects data on a different time frame?

Answer: If your company or program collects data on a different time frame, just use the most up-to-date data available and make a note of the time frame in the corresponding comment box. When available, use data from the 2014 calendar year or the most recent fiscal year.

## Company Inventory

### **Company Inventory**

1. Name of company:
2. Does the company have a healthful eating, active living strategy or initiative at the company level? (Text box for open ended responses and check box for “not available”)
3. Name of healthful eating, active living strategy/initiative, if applicable. (Text box for open ended responses and check box for “not available”)
4. Description of the strategy/initiative, if applicable. (Text box for open ended responses and check box for “not available”)
5. When did the company first start funding healthful eating, active living programs? (Text box for open ended responses)
6. Contact information for person responsible for the strategy: (Text box for open ended responses and check box)  
Name  
Title  
Company  
In which part of the company does this person work (function/department)?  
Phone number  
Email address  
  
Mailing address  
Street address  
Street address 2  
City  
State  
Zip code
7. Contact information for alternate contact (company or field level): (Text box for open ended responses and check box for “not available”)  
Name  
Title  
Company  
Phone number  
Email address  
  
Mailing address  
Street address  
Street address 2  
City  
State  
Zip code
8. When executing the company strategy, which entities provide funding? (Drop down menu)  
Corporation  
Foundation  
Mixture/other – please explain
9. When executing the company strategy, which corporate budgets contribute to the funding? (Drop down menu, check all that apply)

## Company Inventory

Corporate social responsibility (CSR) budget  
Public affairs budget  
Corporate affairs budget  
Marketing budget  
Product development  
Supply chain  
Other (please specify)

10. Total funding in the last calendar year in each of the following categories: (Text box for companies to enter amount)
- Financial resources
  - In-kind resources
  - Matching gifts
  - Employee volunteer hours
  - Employee contributions
  - Other material contributions
11. Total FTEs allotted to managing the strategy or programs in the last calendar year: (Text box for companies to enter amount)
- Staff time
  - Management time
12. Does the company strategy address both normal weight and overweight/obese populations? (Drop down menu)
- Yes
  - No
13. If yes to question 12, are target populations affected by overweight/obesity referred to the following services? (Check all that apply)
- Intensive behavior therapy
  - Medical/pharmacological management
  - Surgical treatment
  - Not applicable

### Qualitative Evaluation

You are encouraged to use bullet points to keep your answers concise. These questions are intended to help capture information that all companies can learn from for their future programming efforts. Your individual responses will be confidential.

14. **What were the principal drivers behind establishing your strategy?** (Text box for open ended responses and check box for “no comment”)
15. **What were the principal benefits the company hoped to realize from creating this strategy?** (Text box for open-ended response and check box for “no comment”)
16. **Please highlight up to three success stories from your strategy (up to 200 words each).** (Text box for open ended response and check box for “no comment”)
17. **What are your strategy’s greatest challenges or biggest limitations? Put another way, what would you do differently if you were to design the strategy from scratch again?** (Text box for open ended response and check box for “no comment”)
18. **Has the strategy delivered any unexpected positive outcomes to date?** (Text box for open ended response and check box for “no comment”)



## Company Inventory

19. **Has the strategy given rise to any unexpected negative outcomes to date?** (Text box for open ended response and check box for “no comment”)
20. **Have you received any praise/positive commentary from stakeholders about the strategy?** (Text box for open ended response and check box for “no comment”)
21. **Have you received any criticism from stakeholders about the strategy?** (Text box for open ended response and check box for “no comment”)
22. **How have you addressed this criticism?** (Text box for open-ended response and check box for “no comment”)
23. **How does the company decide which programs or organizations to invest in or support? What does that decision making process entail?** (Text box for open-ended response and check box for “no comment”)
24. **Who influences or is involved in this decision making process? What aspects of the decision making process do they have control over?** (Text box for open-ended response and check box for “no comment”)
25. **How does the strategy align with the company’s business priorities?** (Text box for open-ended response and check box for “no comment”)

## **Company strategy and governance assessment**

### **1. Design, objectives and strategy**

*This section evaluates the extent to which the company has a well-designed and informed healthful eating, active living strategy*

#### **A Strategy design and alignment**

##### **1 Has the company undertaken research to understand community needs?**

###### Quantitative

Extensive	10
Limited	5
None	0

###### Qualitative

Extensive	10
Limited	5
None	0

Explanatory note: Extensive means the company has gone into communities to collect data on community needs. Limited means the company has undertaken a general review of the existing literature on the community needs.

Explanatory note: Extensive means the company has gone into communities to collect data on community needs. Limited means the company has undertaken a general review of the existing literature on the community needs.

##### **2 Has the company undertaken research to understand existing interventions in the community/ies (so as to avoid duplication and identify opportunities for partnership)?**

Yes, extensively	10
Yes, in a limited way	5
No	0

##### **3 Did the company consult the following groups when undertaking research?**

Experts	2.5
Stakeholder organizations	2.5
Community representatives	2.5
Company leadership and staff	2.5
Outside groups were not consulted	0

## Company Strategy and Governance Assessment

Explanatory note: Experts could include academics or health professionals with expertise in healthful eating, food insecurity, active living, chronic diseases or obesity prevention. Stakeholder organizations could include government agencies, NGOs and other for-profits currently working on healthful eating or active living initiatives. Community representatives could include individual leaders or residents from within the impacted community. Company leadership and staff can include those from within and outside the health portfolio.

### B Strategic plan and objectives

#### 1 The company's strategy is:

Clear and comprehensive	10
Limited	5

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No strategy, decisions on programs made on an ad-hoc basis 0

Explanatory note: A clear and comprehensive strategy would include a vision, goals, objectives and measurable outcomes. A limited strategy would include less than half of those components.

### **2 Is the company's strategy clearly informed by the research undertaken?**

Yes, clearly 10

In a limited way 5

No 0

Explanatory note: "Yes, clearly" means that every goal and objective can be linked to research on the community's needs, existing resources and gaps. "In a limited way" means that only some goals and objectives can be linked to research on the community's needs, existing resources and gaps.

### **3 Is the company's strategy informed by best practice and current understanding of community program funding/development?**

Yes, strategy design is extensively informed by best practices 10

Limited use of best practices in strategy design 5

No 0

Explanatory note: "Extensively informed by best practices" means that every objective and goal in the strategy can be linked to an evidence-based practice or a best practice supported public health research or organizations. "Limited use of best practices in strategy design" means that there is scattered matching between objectives/goals and best practices as identified by public health research or organizations in the strategy.

### **4 Does the company set out goals and objectives for its strategy and a time frame for achieving them?**

Yes, clear goals and objectives, with time frame for achieving them 10

Yes, clear goals and objectives but no time frame 5

Goals and objectives outlined, but not very clearly/without a clear time frame 2.5

No 0

### **5 Does the company set targets for the level of input to its strategy?**

Yes, comprehensive input targets 10

Yes, limited input targets 5

No input targets 0

Explanatory note: Inputs are the resources that a company provides to support a strategy or project. Examples include funding, staff time, delivery in kind, etc. "Yes, comprehensive input targets" mean that the company has specific, measurable targets for all the inputs used to support the strategy. "Yes, limited input targets" means that the company has developed general, measurable targets for only some of the inputs used to support the strategy.

### **6 Does the company set targets for the participation levels/outputs it hopes to achieve through its strategy?**

Yes, comprehensive output targets 10

Yes, limited output targets 5

No output targets 0

Explanatory note: Outputs are the results of providing resources to support a strategy. Examples of outputs could include people reached, number of activities completed, organizations supported, etc. "Yes, comprehensive output targets" means that the company has set specific, measurable targets

## Company Strategy and Governance Assessment

for the majority of its anticipated outputs. “Yes, limited output targets” means that the company set some general, measurable targets for only some of the anticipated outputs.

### **7 Does the company set targets for the outcomes it hopes to achieve through its strategy?**

Yes, comprehensive outcome targets	10
Yes, limited outcome targets	5
No outcome targets	0

Explanatory note: Outcomes refer to what changes or the impact as a result of the strategy. Examples include changes in knowledge, behavior or attitude or health indicators. “Yes, comprehensive outcome targets” means the company has set specific, measurable targets for the majority of their anticipated outcomes. “Yes, limited outcome targets” means the company has set some general, measurable targets for only some of their anticipated outcomes.

### **8 Does the company strategy promote and/or set specific targets for employee volunteerism in healthful eating or active living programs in communities?**

Yes, specific targets set and promotion undertaken	10
Yes, either specific targets are set or promotion undertaken	5
No	0

### **9 Were stakeholders consulted or involved in setting input, output and outcome targets for the strategy?**

Experts	2.5
Policy makers	2.5
Community residents	2.5
Community organizations	2.5
Stakeholders were not consulted or involved in setting strategy targets	0

### **10 Is the company’s strategy designed to specifically address health disparities?**

Yes, it is a clear element of the design	10
Somewhat	5
No	0

Explanatory note: “A clear element of the design” means health disparities are explicitly incorporated into the goals, objectives and outcome of the strategy. “Somewhat” means that the strategy makes reference to health disparities but does not explicitly link health disparities to the goals, objectives and measures of outcome.

## **C Strategy scope and reach**

### **1 Does the company's strategy encompass the following intervention domains?**

Healthful eating	5
Active lifestyles	5

Explanatory note: ‘Healthful eating’ includes hunger and food access programs as having enough food and having access to food are critical (though not sufficient) components of healthful eating.

### **2 Through its strategy does the company aim to support better delivery of existing national, regional or community-led healthful eating, active living type programs:**

Improve connections between existing services/activities	2.5
Link to public health agency priority actions	2.5
Purposefully address both normal weight and overweight (linking primary and secondary	

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interventions)	2.5
Develop cross-sector partnerships	2.5
The strategy does not aim to support better delivery of existing healthful eating, active living type programs	0

Explanatory note: “Improve connections between existing services/activities” means that through the strategy, the company aims to actively collaborate with partner organizations to better connect and align their work. “Link to public health agency priorities” means that the strategy’s aims and objectives align with national and regional public health goals and objectives. “Purposefully address both normal weight and overweight” means that the strategy incorporates and connects both obesity prevention and reduction approaches. “Develop cross-sector partnerships” means that the strategy promotes collaboration with a range of partners from different sectors and industries.

### 3 Does the company allocate resources for programs that provide treatment or clinical referrals to populations that are already affected by obesity?

Yes	10
No	0

### 4 What is the level of complexity of the strategy?

Facilitate systems change	10
Deliver targeted community programs for environmental or behavioral change	5
Increase individual awareness and knowledge	2.5
Unclear or no information	0

Explanatory note: Systems change means that the strategy accounts for multiple actors and users in a community, the capacity of actors/users matched with the complexity of their tasks, feedbacks and interactions across program components and/or effective sequencing of program activities, etc. Targeted programs can be single- or multi-pronged but do not necessarily create systems change.

### 5 What is the geographic reach of the strategy?

National	10
Sub-national/multiple states	7.5
One state/multiple communities	5
One city/community only	2.5
Unclear or no information	0

## 2. Governance, management structures and resources

*This section evaluates whether the company has put in place sufficient and appropriate governance and management systems to deliver its strategy*

### A Governance and leadership

#### 1 At what level in the company is the strategy developed and overseen:

Board level	10
Executive management level	5
Department or division level	2.5
Not clear at what level the strategy is developed and overseen	0

#### 2 Is there a champion for the strategy at the Board level, i.e. one person that leads on delivery and speaks publicly about the strategy?

Yes	10
No	0

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If yes, please state: (text boxes for open ended responses)

Board level champion's name

Board level champion's role

Key messages delivered

Explanatory note: Yes means that there is a designated person at the Board level who is responsible for publicly promoting and discussing the strategy.

### **3 Is there a champion for the strategy at the senior management level, i.e. one person that leads on delivery and speaks publicly about the strategy?**

Yes	10
No	0

If yes, please state: (text boxes for open ended responses)

Senior management level champion's name

Senior management level champion's role

Key messages delivered

Explanatory note: Yes means that there is a designated person at the senior management level who is responsible for publicly promoting and discussing the strategy.

### **4 Has the importance of the company's role in combatting obesity and hunger been advocated at the shareholder level?**

Yes, a discussion of the company's role is included in the annual report	2.5
Yes, the rise of obesity is identified as a key business risk in the company's annual risk assessment or 10K	2.5
Yes, the company's role was addressed at the most recent annual general meeting	2.5
Yes, the company's role is promoted in one-to-one meetings with shareholders	2.5
The company's role in combatting obesity and hunger has not been advocated at the shareholder level	0

## **B Management structures and resources**

### **1 Is a specific person or team responsible for delivery of the strategy?**

Yes	10
No	0

Explanatory note: Yes means that there is a specific person or team dedicated to the delivery of the strategy who oversees and coordinates all the programs within the strategy.

### **2 How is the development or delivery of the strategy informed?**

Advised by a formal panel of external experts	10
Advised through ad-hoc consultation with external experts	5
Neither	0

Explanatory note: "Advised by a formal panel of external experts" means that the company strategy is systematically reviewed by an established and publicly known panel of experts on a regular basis. "Advised through ad-hoc consultation with external experts" means that the company strategy is informally reviewed by a range of external experts when needed.

### **3 Is the salary or bonus of the person responsible for the strategy dependent on**

**their performance in delivering the strategy?**

Yes	10
No	0

**4 Are the governance and management of the company strategy held accountable by a scientific advisory board including representatives from public health?**

Yes	10
No	0

**5 Is there a clear annual strategy delivery plan?**

Yes	10
No	0

**3. Monitoring and evaluation**

*This section assesses whether the company has sufficient and appropriate systems to monitor and evaluate delivery of its strategy through the programs it supports*

**A Monitoring**

**1 Does the company have a system to monitor the programs it supports?**

Yes, comprehensive monitoring system	10
Yes, limited monitoring system	5
No system	0

Explanatory note: “Yes, comprehensive monitoring system” means that the company has an established process to collect a range of quantitative and qualitative data from all programs on a consistent basis. “Yes, limited monitoring system” means that the company has a process to collect quantitative and qualitative data, but may collect only a small set of data from some programs and/or across programs on an inconsistent basis.

**2 How frequently does the company collect quantitative data from programs under the strategy?**

More regularly than annually (e.g. every six or three months)	10
Annually	7.5
At the end of the grant/delivery period only	5
Ad hoc	2.5
No data collected	0

**3 Does the company collect quantitative data consistently from all programs?**

Yes	Score for 1.2 x 2
No	0

**4 Does the company have standard indicators against which it monitors all programs?**

Yes, programs monitored using commonly accepted, externally defined standard metrics set by the company	10
Yes, programs monitored using standard metrics internally developed by the company	7.5
No, programs submit information using their own metrics	5
No information collected/monitored	0

Explanatory note: “Programs monitored using commonly accepted, externally defined standard



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metrics set by the company” means that the company has a defined set of metrics developed by an outside organization, such as an academic institute or public health organization, which are applied to all programs.” “Programs monitored using standard metrics internally developed by the company” means that the company has developed its own defined set of metrics without external consultation that are applied to all programs. Programs submit information using their own metrics” means that the company collects a range of metrics from different programs.

### **5 Which metrics does the company use to monitor the programs?**

Funds spent/resources committed (inputs)	2
Delivery against objectives (outputs)	2
Participation in or reach of program (outputs)	2
Outcomes or impact of program	2
Satisfaction of participants	2
None of the above	0

Explanatory note: Funds spent/resources committed (inputs) are all the resources a company uses to support or develop a program. Objectives (outputs) are what happen as a result of the resources used to support a strategy. Examples of outputs could include number of activities completed, organizations supported, etc. Participation in or reach of program means does the company collect metrics on how many people participate or are involved in a program. Program outcomes are the changes or impact that occurs. Examples include changes in health-related attitude, knowledge, behaviour or clinical indicators.

### **6 Are all programs required to submit a narrative report to the company at least annually?**

Yes	10
No	0

Explanatory note: Narrative reports explain how programs are meeting their established goals and objectives, describe what activities have taken place to achieve their goals and address any challenges.

### **7 Does the company evaluate or rate how well the programs are performing, i.e. delivering against the agreed objectives and targets?**

Yes, systematically	10
Yes, but not systematically	5
No	0

Explanatory note: “Systematically” means that the company has an established, regularly scheduled process to rate or formally evaluate program performance against their identified goals and objectives. “Yes, but not systematically” means that the company only occasionally rates or evaluates program performance against identified goals and objectives or there is not an established process or time frame.

### **8 Who within the company reviews the company’s annual report on the strategy?**

Board	10
Executive management	5
Program staff	2.5
Not clear	0

### **9 Is the delivery and effectiveness of the strategy reviewed regularly by management?**

Yes, annually or more often	10
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Yes, less than annually	5
No	0

### **10 Does the company use the monitoring information to inform its management and delivery of the strategy?**

Yes, clear evidence of a process through which this happens	10
Yes, in a limited way or appears to happen on an ad-hoc basis	5
Not clear or no information how the company uses the information	0

Explanatory note: “Yes, clear evidence of a process” means that the company has an established system with a defined timeframe to analyze program data and to use the findings to refine or adjust strategy management and delivery. “Yes, in a limited way or appears to happen on an ad-hoc basis” means that the company only occasionally uses program data to refine or inform strategy management and delivery or there is not an established system or timeframe for this process.

## B Evaluation

*For highlighted questions in this section, a multiplier of 2 will be applied to the indicator score if the evidence provided by programs is derived from an independent evaluation.*

### **1 Has the delivery and effectiveness of the strategy been independently evaluated?**

Yes	10
No	0

### **2 Has the company met its targets for the level of input to its strategy?**

The company has met or exceeded 75% of the total number of input targets	10
The company has met between 50-75% of the total number of input targets	7.5
The company has met between 25-50% of the total number of input targets	5
The company has met less than 25% of the total number of input targets	2.5
No	0

Explanatory note: Inputs are the resources that a company provides to support a strategy or project. Examples include funding, staff time, delivery in kind, etc.

### **3 Has the company met its targets for the participation levels/outputs it hopes to achieve through its strategy?**

The company has met or exceeded 75% of the total number of participation and output targets	10
The company has met between 50-75% of the total number of participation and output targets	7.5
The company has met between 25-50% of the total number of participation and output targets	5
The company has met less than 25% of the total number of participation and output targets	2.5
No	0

Explanatory note: Outputs are the results of providing resources to support a strategy. Examples of outputs could include people reached, number of activities completed, organizations supported, etc.

### **4 Has the company met its targets for the outcomes it hopes to achieve through its strategy?**

The company has met or exceeded 75% of the total number of outcome targets	10
The company has met between 50-75% of the total number of outcome targets	7.5

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The company has met between 25-50% of the total number of outcome targets	5
The company has met less than 25% of the total number of outcome targets	2.5
No	0

Explanatory note: Outcomes refer to what changes or the impact as a result of the strategy. Examples include changes in knowledge, behavior or attitude or health indicators.

### 5 Has the company strategy met its specific targets for employee volunteerism in promoting healthful eating and active living programs in communities?

The company has met or exceeded 75% of the total number of employee volunteerism targets	10
The company has met between 50-75% of the total number of employee volunteerism targets	7.5
The company has met between 25-50% of the total number of employee volunteerism targets	5
The company has met less than 25% of the total number of employee volunteerism targets	2.5
No	0

### 6 What is the level of funding dedicated to evaluation?

>10% of the total budget for the strategy	10
5-10% of the total budget for the strategy	5
0-4% of the total budget for the strategy	0

Explanatory note: The total budget refers to the total dollar amount a company allocates to community-based healthful eating, active living programs in the last calendar year.

### 7 What is the level of staff time dedicated to the management of the evaluation?

2 FTE or more	10
1 FTE	5
Less than 1 FTE	0

## 4. Reporting, communication and stakeholder engagement

*This section evaluates whether the company communicates effectively about the delivery of its strategy through the programs it supports*

### A Reporting

#### 1 Does the company publish a review of the progress and impacts of its healthful eating, active living strategy that encompasses:

Funds spent/resources committed (inputs)	2
Delivery against objectives (outputs)	2
Participation in or reach of program (outputs)	2
Outcomes of program	2
Satisfaction of the participants	2
Company does not include any of the above or does not publish a review of the progress and impacts of its healthful eating, active living strategy	0

#### 2 How often does the company report on its strategy implementation and results?

Annually or more frequently	10
Less than annually	5
Never	0

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<b>3</b>	<b>Has the company published results from the evaluation of the strategy?</b>	
	Yes, the company publishes independent evaluation results	10
	Yes, the company publishes internal evaluation results	5
	No	0

### B Communication

<b>1</b>	<b>Does the company feedback its view of the programs' progress to each program?</b>	
	Yes, systematically	10
	Yes, occasionally	5
	No	0

Explanatory note: "Yes, systematically" means that the company has a regularly scheduled process to provide feedback to each program on its progress. "Yes, occasionally" means that the company sometimes provides feedback to programs on their progress, but does not have an established timeline or process.

<b>2</b>	<b>Does the company facilitate sharing of experience among all its sponsored/supported programs?</b>	
	Yes, systematically	10
	Yes, occasionally	5
	No	0

Explanatory note: "Yes, systematically" means that the company has regularly scheduled opportunities to facilitate sharing of experience for all programs. "Yes, occasionally" means that the company provides opportunities to facilitate sharing of experience on an ad-hoc basis or to some programs only. Examples include hosting an annual meeting for all program leads, online forums, webinars, etc.

<b>3</b>	<b>Are the results of the evaluation disseminated via:</b>	
	Scientific journals	2.5
	Scientific conferences	2.5
	Publicly accessible website	2.5
	Company reports	2.5
	Company does not disseminate evaluation results	0

### C Stakeholder engagement

<b>1</b>	<b>Does the company explicitly seek feedback from stakeholders during and after the implementation of its strategy?</b>	
	Yes, systematically	10
	Yes, occasionally	5
	No	0

Explanatory note: "Yes, systematically" means that the company has established, regularly scheduled procedures to get feedback from a variety of stakeholders on strategy design and delivery. "Yes, occasionally" means that the company sometimes seeks feedback from stakeholders but on an ad hoc basis only.

<b>2</b>	<b>Does the company share the performance of its strategy with community stakeholders?</b>	
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## Company Strategy and Governance Assessment

Yes, annually or more frequently	10
Yes, less than annually	5
No	0

## **Program inventory**

**Information provided for the following questions should be from the previous operating year of the program.**

**We hope to be able to generate some ratios that compare the resource intensity or relative effectiveness of programs from the information collected. As we collect data each year, we will be able to demonstrate trends, and measure change using this first year as a baseline.**

**1. Name of program:**

**2.Type of program: (Drop down menu)**

Healthful eating  
Active living Both

**3.Focus of program: (Drop down menu, check all that apply)**

Nutrition/health education  
Provision of meals  
Active transport  
Physical activity  
Cooking skills Healthy recipes Growing food  
Mass media/awareness campaign  
Water or beverage intake  
Screen time  
Sleep  
Team sports  
Breastfeeding  
Portion size Food access Urban design Parenting  
Health screenings  
Other: please explain (text box)

**4.Date initiated: Month, year (Tool)**

**5.Investment & resources: How much has the company invested in this program? (Text boxes for open-ended responses)**

Money (US\$)  
Company staff salaries and benefits (US\$)  
Management time (hours)  
Employee volunteer time (hours)  
In-kind contributions

**6. Geographic scope: (Drop down menu)**

One city/community  
One state/multiple communities  
Sub-national/multiple states  
National

## Program Inventory

**7. Markets served: (Check all that apply)**

City, state (tool)

**8. Is the program directed at: (Check all that apply)**

Health and/or nutrition professionals

Non-health community leaders (e.g. teachers, clergy members)

General public

Both

**9. Is the program open to/targeted towards: (Drop down, check all that apply)**

Children 0-5

Children 6 – 12

Youth: 12-18

Young adults: 18 – 25

General population 25 – 65

Pregnant women

Elderly: 65+

People with disabilities

Veterans

**10. Is the program delivered: (Check all that apply)**

Online

In person

Both

**11. Does the program involve donating, serving or giving away the company's products?**

Yes, company provides product alone

Yes, company provides product and funding

No

**12. Is the program linked to consumer purchases, i.e. do consumers have to purchase a product and redeem a voucher or submit their personal information to participate or trigger donations or funding?**

Yes

No

**13. Does the program carry branding? (Check all that apply)**

Corporate-level

Brand-level

Both

No

Other: please explain (text tool)

**14. Do participants have to pay to participate in the program?**

Yes

No

**15. Does the program target any minority groups? (Drop down, check all that apply)**

African American

Latin American

Native American

Other: please explain

None

**16. Does the program target these groups?**

## Program Inventory

Yes, Exclusively

Yes, non-exclusively (i.e. it is open to other groups as well)

Not at all (i.e. there is no explicit targeting)

**17. Program web page: (text box to insert web page)**

**18. Upload progress report or provide URL:**

**19. Other companies you collaborate with on this program: (Drop down menu with other HWCF members and none. Text tool to enter additional partners.)**

**20. Partner role: (Drop down menu, check all that apply)**

Intervention design

Intervention implementation

Intervention evaluation

Other (please explain)

**21. Total funding contribution from partners in the last calendar year in each of the following categories: (Text box for companies to enter amount)**

Monetary contribution

Employee volunteerism

In-kind resources provided

Material contributions

**22. . Total FTEs allotted in the last calendar year from partners: (Text box for companies to enter amount)**

Staff time

Management time

**23. What activities does the program use to deliver its objectives and outcomes? (Check all that apply, plus text box for open-ended responses)**

Launch a website

Send out information in the mail

Advertise programs

Recruit program participants

Outreach to potential partner organizations

Teach meal preparation skills

Lead cooking demonstrations

Distribute healthy recipes

Teach menu planning or food budgeting skills

Build playgrounds

Lead exercise or physical activity program

Develop gardens

Teach gardening skills

Plant fruit trees

Mass media awareness campaign

Social media

Develop corporate volunteer programs

Donate food

Donate physical activity or sports equipment

Fund youth sports league

Sponsor physical activity events (i.e. fun runs or bike events)

Train the trainer

Other: please explain



## Program Inventory

**24. General community output targets: (Text box for companies to enter amount and check boxes for each question with “Not available”)**

- Target number of people to reach/engage in program
- Target number of program partners
- Target number of built environment strategies to be adopted across communities (i.e. program built additional walking paths or grocery stores)

**25. General community outputs achieved: (Text box for companies to enter amount and check boxes for each question with “Not available”)**

- Number of people actually reached/engaged in program
- Number of actual program partners
- Number of built environment strategies actually adopted across communities (i.e. program built additional walking paths or grocery stores)

**26. Mechanisms for change: (Check all that apply, plus text boxes for open-ended response)**

- Collaboration among partners/sectors
- Policy
- Community/organizational capacity
- Social support/social networks
- Individual knowledge and skills
- Environment
- Not available

**27. Partner/community organization outputs: (Check all that apply, plus text boxes for open-ended response)**

- Improved or new services
- Reached more clients or spent more time with clients
- Increased their profile
- Took on more staff or volunteers
- Changes in institutional policies or environment which promote healthful eating or active living
- Improved management processes
- Increased support for community-based obesity interventions
- Increased demand for services aligned with company's program
- New partners or funders
- Not available

**28. Company outputs: (Check all that apply, plus text boxes for open-ended response)**

- Changes in business performance
- Operational improvement delivered
- Stakeholder relations/perceptions
- Human resources benefit
- Influenced change among other companies
- Public health supported policy change
- Not available

*Based on the answer to question 2 (“type of program”), programs will answer different questions.*

*Healthful eating programs will answer question 29 and 30.*

*Active living programs will answer question 31 and 32.*

*Combined healthful eating, active living programs will answer questions 29 through 32.*

**29. Healthful eating program output targets: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

- Target number of meals served
- Target amount of pounds of food donated
- Target number of servings of food donated

## Program Inventory

Target macronutrient levels of meals served/food donated (i.e. carbohydrates, protein, etc.)

**30. Healthful eating program outputs achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Number meals actually served

Pounds of food actually donated

Number of servings of food actually donated

Macronutrient levels of meals actually served/food donated (i.e. carbohydrates, protein, etc.)

**31. Active living program output targets: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Target number of hours spent exercising

Target number of schools participating in a program

**32. Active living program outputs achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Number of hours actually spent exercising

Number of schools actually participating in a program

*Based on question 2 (“type of program”), programs will answer different outcome questions.*

*Healthful eating programs will answer questions 33-38.*

*Active living programs will answer questions 39-44.*

*Combined healthful eating, active living programs will answer questions 45-50.*

### **Healthful eating program outcomes**

**33. Knowledge, attitude and belief (psychosocial) outcome targets: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Target proportion of participants reporting changes in food/nutrition attitudes, knowledge or beliefs

Target proportion of participants reporting decreases in stress, anxiety or depression

Target proportion of participants reporting increases in self-efficacy or motivation regarding healthful eating

Target proportion of participants reporting increased support for community-based obesity interventions

**34. Knowledge, attitude and belief (psychosocial) outcomes achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Proportion of participants actually reporting changes in food/nutrition attitudes, knowledge or beliefs

Proportion of participants actually reporting decreases in stress, anxiety or depression

Proportion of participants actually reporting increases in self-efficacy or motivation regarding healthful eating

Proportion of participants actually reporting increased support for community-based obesity interventions

**35. Behavioral outcome targets: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Target percent reduction in total Kcal sold to or purchased or consumed by program participants

Target proportion of participants increasing number of servings of fruit or vegetables

Target proportion of participants increasing water intake

Target proportion of children increasing frequency of eating breakfast

Target proportion of participants reporting decreases in number of times the food they bought didn't last and they didn't have money to buy more

## Program Inventory

Target proportion of participants reporting decreases in number of times they worried about whether their food would run out before they had money to buy more

**36. Behavioral outcomes achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Percent reduction actually achieved in total Kcal sold to or purchased or consumed by program participants

Proportion of participants actually increasing number of servings of fruit or vegetables

Proportion of participants actually increasing water intake

Proportion of children actually increasing frequency of eating breakfast

Proportion of participants actually reporting decreases in number of times the food they bought didn't last and they didn't have money to buy more

Proportion of participants actually reporting decreases in number of times they worried about whether their food would run out before they had money to buy more

**37. Clinical health outcome targets: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Target proportion of participants with decreases in BMI (or another measure of body fat)

Target percent decrease in the prevalence of overweight and obese children

**38. Clinical health outcomes achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Proportion of participants with actual decreases in BMI (or another measure of body fat)

Actual percent decrease in the prevalence of overweight and obese children

### Active living program outcomes

**39. Knowledge, attitude and belief (psychosocial) outcome targets: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Target proportion of participants reporting changes in physical activity attitudes, knowledge or beliefs.

Target proportion of participants reporting decreases in stress, anxiety or depression

Target proportion of participants reporting increases in self-efficacy or motivation regarding active living

Target proportion of participants reporting increased support for community-based obesity interventions

**40. Knowledge, attitude and belief (psychosocial) outcomes achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Proportion of participants actually reporting changes in physical activity attitudes, knowledge or beliefs.

Proportion of participants actually reporting decreases in stress, anxiety or depression

Proportion of participants actually reporting increases in self-efficacy or motivation regarding active living

Proportion of participants actually reporting increased support for community-based obesity interventions

**41. Behavioral community outcomes target: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Target proportion of participants increasing minutes of total physical activity or moderate to vigorous physical activity (MVPA)

Target proportion of participants increasing use of active means of transportation

Target proportion of participants decreasing screen time

Target number of steps taken

**42. Behavioral community outcomes achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

## Program Inventory

Proportion of participants actually increasing minutes of total physical activity or moderate to vigorous physical activity (MVPA)  
Proportion of participants actually increasing use of active means of transportation  
Proportion of participants actually decreasing screen time  
Number of steps actually taken

**43. Clinical health outcome targets: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Target proportion of participants with decreases in BMI (or another measure of body fat)  
Target percent decrease in the prevalence of overweight and obese children

**44. Clinical health outcomes achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Proportion of participants with actual decreases in BMI (or another measure of body fat)  
Actual percent decrease in the prevalence of overweight and obese children

### Healthful eating and active living program outcomes

**45. Knowledge, attitude and belief (psychosocial) outcome targets: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Target proportion of participants reporting changes in food/nutrition attitudes, knowledge or beliefs  
Target proportion of participants reporting decreases in stress, anxiety or depression  
Target proportion of participants reporting increases in self-efficacy or motivation regarding healthful eating  
Target proportion of participants reporting increased support for community-based obesity interventions  
Target proportion of participants reporting changes in physical activity attitudes, knowledge or beliefs.  
Target proportion of participants reporting increases in self-efficacy or motivation regarding active living

**46. Knowledge, attitude and belief (psychosocial) outcomes achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Proportion of participants actually reporting changes in food/nutrition attitudes, knowledge or beliefs  
Proportion of participants actually reporting decreases in stress, anxiety or depression  
Proportion of participants actually reporting increases in self-efficacy or motivation regarding healthful eating  
Proportion of participants actually reporting increased support for community-based obesity interventions  
Proportion of participants actually reporting changes in physical activity attitudes, knowledge or beliefs.  
Proportion of participants actually reporting increases in self-efficacy or motivation regarding active living

**47. Behavioral outcome targets: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Target percent reduction in total Kcal sold to or purchased or consumed by program participants  
Target proportion of participants increasing number of servings of fruit or vegetables  
Target proportion of participants increasing water intake  
Target proportion of children increasing frequency of eating breakfast  
Target proportion of participants reporting decreases in number of times the food they bought didn't last and they didn't have money to buy more  
Target proportion of participants reporting decreases in number of times they worried about whether their food would run out before they had money to buy more

## Program Inventory

Target proportion of participants increasing minutes of total physical activity or moderate to vigorous physical activity (MVPA)  
Target proportion of participants increasing use of active means of transportation  
Target proportion of participants decreasing screen time  
Target number of steps taken

**48. Behavioral outcomes achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Percent reduction actually achieved in total Kcal sold to or purchased or consumed by program participants  
Proportion of participants actually increasing number of servings of fruit or vegetables  
Proportion of participants actually increasing water intake  
Proportion of children actually increasing frequency of eating breakfast  
Proportion of participants actually reporting decreases in number of times the food they bought didn't last and they didn't have money to buy more  
Proportion of participants actually reporting decreases in number of times they worried about whether their food would run out before they had money to buy more  
Proportion of participants actually increasing minutes of total physical activity or moderate to vigorous physical activity (MVPA)  
Proportion of participants actually increasing use of active means of transportation  
Proportion of participants actually decreasing screen time  
Number of steps actually taken

**49. Clinical health outcome targets: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Target proportion of participants with decreases in BMI (or another measure of body fat)  
Target percent decrease in the prevalence of overweight and obese children

**50. Clinical health outcomes achieved: (Text boxes for companies to enter amount and check boxes for each question with “Not available”)**

Proportion of participants with actual decreases in BMI (or another measure of body fat)  
Actual percent decrease in the prevalence of overweight and obese children

### Qualitative evaluation

You are encouraged to use bullet points to keep your answers concise.

51. **What did you expect would be the most important outcome of the program?** (Text box for open ended responses and check box for “no comment”)
52. **Please highlight up to three success stories from your program (up to 200 words each).** (Text box for open ended responses and check box for “no comment”)
53. **Have there been any unexpected positive outcomes from the program to date?** (Text box for open ended responses and check box for “no comment”)
54. **Have there been any unexpected negative outcomes from the program to date?** (Text box for open ended responses and check box for “no comment”)
55. **Have you received any praise/positive commentary or recognition from stakeholders or non-industry groups about the program?** (Text box for open ended responses and check box for “no comment”)
56. **Have you received any criticism from stakeholders about the program?** (Text box for open ended responses and check box for “no comment”)

## Program Inventory

57. **How have you addressed this criticism?** (Text box for open ended response and check box for “no comment”)
58. **If the program is implemented in multiple sites or communities, what are the differences across program sites?** (Text box for open ended response and check box for “no comment”)
59. **What are the program implementation challenges?** (Text box for open ended response and check box for “no comment”)
60. **What are the biggest limitations in your current program? Put another way, what would you do differently if you were to design the program from scratch again?** (Text box for open ended response and check box for “no comment”)

## **Program strategy and governance assessment**

### **1. Design, objectives and strategy**

*This section evaluates the extent to which the program is well designed*

#### **A Program design and alignment**

##### **1 Has the program undertaken research to understand community needs?**

Quantitative	
Extensive	10
Limited	5
None	0
Qualitative	
Extensive	10
Limited	5
None	0

Explanatory note: Extensive means the company has gone into communities to collect data on community needs. Limited means the company has undertaken a general review of the existing literature on the community needs.

##### **2 Is it clear that the program's design is informed by research?**

Yes, strategy is extensively informed by research	10
Yes, strategy is somewhat informed by research	5
No	0

Explanatory note: "Extensively informed" means that every program goal and objective can be linked to research on the community's needs, existing resources and gaps. "Somewhat informed" means that only some program goals and objectives can be linked to research on the community's needs, existing resources and gaps.

##### **3 Is it clear that the program identified other healthful eating, active living programs, activities, initiatives or services in relevant local communities to avoid overlap?**

Yes, extensive identification of other healthful eating, active living programs	10
Yes, but in a limited way	5
No	0

Explanatory note: "Yes, extensive identification of other healthful eating, active living programs" means the program has mapped a diverse range of existing healthful eating, active living programs and has an understanding of the overall scope of work being done, including gaps and opportunities, in the local community. "Yes, in a limited way" means that the program mapped only some other healthful eating, active living programs or has a limited understanding of the scope of work being done in the local community.

##### **4 Is it clear that the program links to/aligns with the company's overarching healthful eating, active living strategy, i.e. why the company decided to fund the program?**

Yes, clear and comprehensive alignment	10
Yes, in a limited way	5
No	0

Explanatory note: "Clear and comprehensive alignment" means that the all of the program goals and

## Program Strategy and Governance Assessment

objectives can be directly linked to parts of the company's overarching healthful eating, active living strategy. "Yes, in a limited way" means only some of the program goals and objectives can be linked to the company's overarching healthful eating, active living strategy.

### **5 Were stakeholders consulted about the design of the program?**

Experts	2
Policy makers	2
Community residents	3
Community organizations	3
Stakeholders were not consulted about program design	0

### **B Program objectives, strategy and plan**

#### **1 Does the program set out the problems it seeks to address?**

Yes, clearly and comprehensively	10
Yes, but not very clearly	5
No	0

Explanatory note: "Yes, clearly and comprehensively" means that the program has articulated the problem it seeks to address using quantitative and qualitative research from a range of sources and stakeholders. "Yes, but not very clearly" means that the program has articulated parts of the problem with limited use of quantitative or qualitative research.

#### **2 Does the design of the program incorporate input from multiple stakeholders? (Check all that apply)**

- Parks and Recreation
- Academics
- Schools
- Food environment
- Worksites
- Local businesses
- Urban planning
- Hospitals
- Community wellness organizations
- Transportation

Scoring: ≥6 partners = 10 points. 4-5 partners = 5 points 1-3 partners = 2.5 points 0 partners = 0 points

#### **3 Does the program set out one or more clear objectives and a time frame for achieving them?**

Yes, clear goals and objectives with time frame for achieving them	10
Yes, clear goals and objectives, but no time frame	5
Goals and objectives outlined, but not very clearly, with or without a clear timeframe	2.5
No	0

#### **4 Is the program design informed by best practice?**

Yes, extensively informed by best practices	10
Yes, limited use of best practices in program design	5
No	0

Explanatory note: "Yes, extensively informed by best practices" means that every objective and



## Program Strategy and Governance Assessment

goal in the program design can be linked to a best practice. “Yes, limited use of best practices in program design” means that there is scattered matching between objectives and goals in the program design and best practices.

### **5 Does the program set out one or more clear targets?**

Yes, SMART targets	10
Yes, but not SMART targets	5
No	0

Explanatory note: “Yes, SMART targets” means that the program has articulated targets which are specific, measurable, attainable, realistic and timely (SMART). Specific means that the target has a defined focus. Measurable means that the target can be quantified. Attainable and realistic mean that the target is achievable with the given time frame and available resources. Timely means that a deadline or time frame has been identified. “Yes, but not SMART targets” means that the program has articulated targets but they do not meet all of the SMART criteria.

### **6 Does the program set outcome targets that adhere to a plausible pathway of change?**

Yes, extensively	10
Yes, in a limited way	5
No	0

Explanatory note: Outcomes refer to what changes or the health impact as a result of the program. Examples include changes in knowledge, attitude or behaviour or clinical indicators. “Yes, extensively” means that all the program’s outcome targets connect to the inputs, activities or outputs described in the program plan or theory of change. “Yes, in a limited way” means that only some of the program’s outcome targets connect to the inputs, activities or outputs described in the program plan or theory of change.

### **7 Does the program set outcome targets for reductions in body mass index (BMI) or for reductions using another measure of body fat?**

Yes	10
No	0

*Based on the program’s answer to “Program Inventory, Question 2 Type of program,” programs will answer different outcome target questions.*

*If the answer to question 2 is “healthful eating,” programs answer questions 8 and 9.*

*If the answer to question 2 is “active living,” programs answer question 10.*

*If the answer to question 2 is “both,” programs answer questions 8- 10.*

### **8 Does the program set outcome targets for changes in nutrition intake that adhere to a plausible pathway of change?**

Yes, extensively	10
Yes, in a limited way	5
No	0

Explanatory note: “Yes, extensively” means that all of the program’s nutrition intake outcome targets connect to the inputs, activities or outputs described in the program plan or theory of change and connect to research on the community and best practices. “Yes, in a limited way” means that only some of the program’s nutrition intake outcome targets connect to the inputs, activities or outputs described in the program plan or theory of change or do not connect to research on the community and best practices.

### **9 When setting nutrition targets, does the company consider thresholds of added**

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### **sugar, fat and/or fiber content?**

Yes, more than one macronutrient component is considered	10
Yes, one macronutrient component is considered	5
No consideration is given to macronutrient thresholds in setting nutrition targets	0

### **10 Does the program set outcome targets for changes in physical activity behavior that adhere to a plausible pathway of change?**

Yes, extensively	10
Yes, to some degree	5
No	0

Explanatory note: “Yes, extensively” means that all of the program’s physical activity behaviour outcome targets connect to the inputs, activities or outputs described in the program plan or theory of change and connect to research on the community and best practices. “Yes, in a limited way” means that only some of the program’s physical activity behaviour outcome targets connect to the inputs, activities or outputs described in the program plan or theory of change or do not connect to research on the community and best practices.

### **11 Were stakeholders consulted or involved in setting outcome targets for the program?**

Experts	2.5
Policy makers	2.5
Community residents	2.5
Community organizations	2.5
Stakeholders were not consulted or involved in setting outcome targets for the program	0

### **12 Does the program set out a clear theory of change, i.e. how its activities will address the problems and the outcomes it intends to deliver?**

Yes, very well	10
Yes, but not very well	5
No	0

Explanatory note: A program’s theory of change describes how the program will use inputs, activities and outputs to address the problem and achieve the target outcomes. “Yes, very well” means that program has articulated the connections between all inputs, activities, and outputs and how they will address the problem and achieve the intended outcomes. “Yes, but not very well” means that the program has articulated only some of the connections between inputs, activities and outputs or has not defined how they will address the problem or achieve the intended outcomes.

### **13 Are there multiple partners with evidence of consensus around the program's ultimate goals and commitment to a shared vision for change?**

Yes, there are multiple partners with a shared vision for change	10
Yes, there are multiple partners with a limited shared vision for change	5
No	0

Explanatory note: “Yes, there are multiple partners with a shared vision for change” means that all program partners, including the community organizations responsible for program delivery, have agreed to the program’s ultimate goals and how to achieve them. “Yes, there are multiple partners with a limited shared vision for change” means that only some of the partners have agreed to the program’s ultimate goals or only some of the partners have agreed on how to achieve the program’s goals.

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### 14 Does the program set clear annual plans for achieving the objectives?

Yes, sets clear, comprehensive annual plans	10
Yes, sets out limited annual plans	5
No	0

Explanatory note: “Yes, sets clear, comprehensive annual plans” means that the program develops an annual strategy which includes a vision, goals, objectives and measurable outcomes. “Yes, sets out limited annual plans” means that program’s annual strategy includes less than half of those components.

### 15 Does the program include health disparity reducing strategies?

Yes, includes comprehensive strategies	10
Yes, includes limited strategies	5
No	0

Explanatory note: “Yes, includes comprehensive strategies” means that health disparities are explicitly incorporated into the program’s goals, objectives and measures of outcome. “Yes, includes limited strategies” means that the program strategy makes reference to health disparities but does not explicitly link health disparities to the program’s goals, objectives and measures of outcome.

## C Program scope and reach

### 1 What is the geographic reach of the program?

National	10
Sub-national/multiple states	7.5
One state/multiple communities	5
One city/community only	2.5
Unclear or no information	0

### 2 Does the program aim to address:

Healthful eating	5
Active living	5

Explanatory note: ‘Healthful eating’ includes hunger and food access programs as having enough food and having access to food are critical components of healthful eating.

### 3 What is the level of complexity of the program strategy?

Facilitate systems change	10
Deliver targeted community programs for environmental or behavioral change	5
Increase individual awareness and knowledge	0

Explanatory note: Systems change means that the strategy accounts for multiple actors and users in a community, the capacity of actors/users matched with the complexity of their tasks, feedbacks and interactions across program components and/or effective sequencing of program activities, etc. Targeted programs can be single- or multi-pronged but do not necessarily create systems change.

### 4 Does the program employ systems thinking or intervene directly on systems levers? (Intervening on interconnections across level, above social networks, feedbacks, creating systems change)

Yes, very well	10
Yes, but not very well	5
No	0

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Explanatory note: “Yes, very well” means that the program incorporates systems thinking throughout all stages of program design and development and that some of the program goals and objectives are linked to creating systems change. “Yes, but not very well” means that the program includes systems thinking in only some stages of program design and development or systems change is not linked to program goals or objectives.

### **5 Does the program make connections between existing services/activities that promote healthy eating or active living?**

Yes, very well	10
Yes, but not very well	5
No	0

Explanatory note: “Yes, very well” means that the program regularly collaborates with partner organizations in the healthful eating, active living field to better align their work and has a developed system and time frame for this process. “Yes, but not very well” means that the program only occasionally collaborates with partner organizations in the healthful eating, active living field to better align services or does not have a developed system or time frame for this process.

## **2. Governance, management, resources and reinforcing activities**

*This section evaluates whether the program has sufficient and appropriate governance and management systems to deliver its objectives.*

### **A Management**

#### **1 How is the development and/or delivery of the program advised?**

Advised by a formal panel of external experts	10
Advised through ad-hoc consultation with external experts	5
Neither	0

Explanatory note: “Advised by a formal panel of external experts” means that the program development and/or delivery are systematically reviewed by an established and publicly known panel of experts on a regular basis. “Advised through ad-hoc consultation with external experts” means that the program development and/or delivery are informally reviewed by a range of external experts when needed.

#### **2 Is there evidence of a clear annual delivery plan?**

Yes	10
No	0

Explanatory note: Yes means that the program produces a written plan outlining how they will achieve their goals and objectives on a yearly basis.

#### **3 Does the program have an identified or established management structures?**

Yes, well-established and defined management structures	10
Yes, limited or somewhat established management structures	5
No	0

Explanatory note: “Yes, well-established and defined management structures” means that the program has clearly set out how all management roles and responsibilities are assigned and coordinated to support the program goals and objectives. “Yes, limited or somewhat established management structures” means that the program has set out only how some of the management roles and responsibilities are and assigned and coordinated to support the program goals and objectives.

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### **4 Are roles and responsibilities of management staff clearly set out in documentation and consistent with program aims and objectives?**

Yes, clearly defined and consistent	10
Yes, somewhat defined and consistent	5
No	0

Explanatory note: “Yes, clearly defined and consistent” means that all roles and responsibilities of management staff have been articulated and can be clearly linked to specific program aims and objectives. “Yes, somewhat defined and consistent” means that only some roles and responsibilities of management staff have been articulated or have not all been clearly linked to specific program aims and objectives.

### **5 Does the program management staff have a clear understanding of their roles and expected contributions?**

Yes, extensively	10
Yes, to a limited degree	5
No	0

Explanatory note: “Yes, extensively” means that there is a documented form of communication that conveys a clear understanding of the roles and responsibilities of program staff in relation to program goals and objectives. “Yes, to a limited degree” means that the roles and responsibilities of program management staff in relation to program goals and objectives are discussed but not clearly documented.

### **6 Is the program management staff’s sense of ownership and responsibility addressed or assessed (i.e. through training programs, retreats or inclusion in annual evaluations)?**

Yes, extensively	10
Yes, to a limited degree	5
No	0

Explanatory note: “Yes, extensively” means that the majority of staff feel ownership of and responsibility for the program and that there is a formal process of encouraging staff ownership and accountability. “Yes, to a limited degree” means that less than the majority of staff feels ownership of or responsibility for the program and/or there is no formal process of facilitating this.

### **7 Does the program management use transparent and open decision making processes?**

Yes, consistently	10
Yes, not consistently	5
No	0

Explanatory note: “Yes, consistently” means that the program regularly shares the processes used to make most decisions. “Yes, not consistently” means that the program only occasionally shares the processes used to make decisions.

### **8 Does the program management engage company leadership in issues of strategic importance?**

Yes, always	10
Yes, sometimes	5
No	0

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Explanatory note: “Yes, always” means that the program has developed channels and processes to regularly communicate and discuss the program’s strategy and development with company leadership. “Yes, sometimes” means that the program only occasionally discusses program strategy with company leadership or there is not a specific system or time frame for this process.

### **9 Do program management and company leadership provide support, strategic guidance and leadership for partners?**

Yes, always	10
Yes, sometimes	5
No	0

Explanatory note: “Yes, always” means that program management and company leadership have developed systems with a clear time frame to provide support and guidance for partners. “Yes, sometimes” means that program management and company leadership only occasionally provide support and guidance for partners or lack a clear system or time frame for this process.

### **10 Is the salary or bonus of staff linked to program performance?**

Yes	10
No	0

## **B Resources**

### **1 Does the program have full control over its own budget?**

Yes	10
No	0

### **2 Is the number of staff adequate to fulfill all the functions of the program?**

Yes	10
No	0

Explanatory note: Yes means that the program is sufficiently staffed to deliver all program goals and objectives.

### **3 Is funding of the program secure?**

Yes, on a multi-year basis	10
Yes, on an annual basis	5
No	0

### **4 Is funding provided for:**

Company staff	2.5
Community-based staff	2.5
Delivery partners	2.5
Independent evaluation	2.5
Unclear or no information available	0

## **C Reinforcing activities and coordination of activities**

### **1 Do different stakeholders or partners within or in support of the program have clear approaches or goals for their own contributions?**

Yes, clearly defined approaches and goals	10
Yes, somewhat defined approaches or goals	5
No	0

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Explanatory note: “Yes, clearly defined approaches and goals” means that all stakeholders and partners have articulated how their roles and responsibilities link to the delivery of specific program goals and objectives. “Yes, somewhat defined approaches and goals” means that only some stakeholders and partners have articulated how their roles and responsibilities link to the delivery of specific program goals and objectives.

<b>2</b>	<b>Has the program led to positive changes in other community activities so they are more synergistically aligned with this program's community health goals?</b>	
	Yes, two examples or more	10
	Yes, one example only	5
	No	0

<b>3</b>	<b>Does program management serve as a convener of partners and stakeholders to ensure alignment of activities among other programs operating in the same geography?</b>	
	Yes, annually or more often	10
	Yes, less than annually	5
	No	0

### 3. Monitoring and evaluation

*This section assesses whether the program effectively monitors and evaluates delivery of its objectives and plan.*

#### A Monitoring

<b>1</b>	<b>The monitoring system includes:</b>	
	A comprehensive set of indicators	10
	A limited set of indicators	5
	No evidence of monitoring of progress/achievement of objectives	0

Explanatory note: “A comprehensive set of indicators” means that the monitoring system includes indicators to measure the program delivery at all levels of its strategy including program inputs, activities, outputs and psychosocial, behavioral and clinical health outcomes. “A limited set of indicators” means that the monitoring system includes indicators to measure the program delivery at only some levels of its strategy or does not include indicators for psychosocial, behavioral and clinical health outcomes.

<b>2</b>	<b>Does the program measure:</b>	
	Inputs	2
	Activities	2
	Outputs	2
	Outcomes	4
	No monitoring system or none of the above	0

Explanatory note: Inputs are the resources that a company provides to support a strategy or project. Examples include funding, staff time, delivery in kind, etc. Activities are all of the actions and events used to deliver the program outputs. Examples of activities could include cooking demonstrations, sports events or social media campaigns. Outputs are what happen as a result of the resources used to support a strategy. Examples of outputs could include people reached, number of activities completed, number of organizations supported, etc. Outcomes refer to what changes or the health impact as a result of the program. Examples include changes in knowledge, attitude or behaviour or clinical indicators.

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### **3 Do the metrics used clearly link to the theory of change/logic model/objectives?**

Yes, extensively	10
Yes, in a limited way	5
No	0

Explanatory note: A program's theory of change or logic model describes how the program will use inputs, activities and outputs to achieve the target outcomes. "Yes, extensively" mean that all of the metrics used directly connect to components of the program's theory of change or logic model. "Yes, in a limited way" means that only some of the metrics used directly connect to the program's theory of change or logic model.

### **4 Is there evidence that the information and data generated from monitoring are used to inform program strategy and direction?**

Yes, clear evidence	10
Yes, in a limited way or appears to happen on an ad-hoc basis	5
No	0

Explanatory note: "Yes, clear evidence" means that the program has an established system with a defined time frame to analyse program data and to use the findings to refine or adjust the program strategy and direction. "Yes, in a limited way or appears to happen on an ad-hoc basis" means that the program only occasionally uses program data to refine or inform the program strategy and direction or there is not an established system or timeframe for this process.

### **5 Is the monitoring system adaptive to changes in measurement priorities and approaches as the initiative evolves?**

Yes	10
No	0

Explanatory note: Yes means there is evidence the monitoring system is flexible to accommodate measurement priorities and refinement of programmatic strategies.

### **6 Is an IT platform available to support the monitoring activities?**

Yes, sophisticated or customized (e.g. professional platform, tools, analytics)	10
Yes, rudimentary (e.g. Excel spreadsheets)	5
No	0

Explanatory note: "Yes, sophisticated or customized" means that the IT platform has been specifically designed to support program monitoring activities and to provide data analysis. "Yes, rudimentary" means that the program has adapted another type of platform (e.g. Excel spreadsheets or an Access database) to support monitoring activities.

### **7 Is training provided on the IT platform and monitoring activities?**

Yes, both management and community-based staff	10
Yes, management staff only	5
No	0

## **B Evaluation**

***For highlighted questions in this section, a multiplier of 2 will be applied to the indicator score if the evidence provided by programs is derived from an independent evaluation.***

### **1 How is the program evaluated?**

By expert external evaluators	10
Internally	5



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No evaluation 0

Explanatory note: “Expert external evaluators” means that independent, trained evaluators are hired to assess the program. “Internally” means that staff within the program conduct the evaluation.

### **2 What processes are used to evaluate the program?**

Qualitative assessments (e.g. interviews, focus groups, ethnographies, etc.)	2
Longitudinal assessment	2
Surveys	2
Comparison with a control group	2
Randomization to a program or control group	2
No evaluation or none of the above	0

Explanatory note: Qualitative assessments use non-numeric data to gain insight into a program’s process and impact. Qualitative assessment methods can include interviews with program staff and participants, focus groups (a facilitated discussion on pre-determined topics among a small group), or ethnographies (a systematic study of a community or culture). Surveys can be used to gather information about program participants such as their perceptions of the program or changes made because of the program. Longitudinal assessments study the same group of people over an extended period of time and collect data on participant outcomes and exposures more than once to understand how they change over time. Comparison with a control group means that one group of participants are engaged in a program or intervention and are then compared to a similar group of people who did not participate in the program or intervention. Randomization to a program or control group means that participants are randomly assigned to be in one of two groups. One group participates in a program or intervention (program group) and the other group does not (control group). The two groups are then compared.

### **3 How often is evaluation undertaken?**

Every two years or more often	10
Every two to five years	5
No evaluation	0

### **4 Does the evaluation measure the cost-effectiveness of the program?**

Yes	10
No	0

Explanatory note: Cost-effectiveness is a form of analysis which examines the relative costs of a program compared to its outcomes or impact.

### **5 Has the program met its outcome targets?**

The program has met or exceeded 75% of the total number of outcome targets	10
The program has met between 50-75% of the total number of outcome targets	7.5
The program has met between 25-50% of the total number of outcome targets	5
The program has met less than 25% of the total number of outcome targets	2.5
No	0

Explanatory note: Outcomes refer to what changes or the health impact as a result of the program. Examples include changes in knowledge, attitude or behaviour or clinical indicators.

### **6 Did the program reduce BMI or an alternate measure of body fat among the target population?**

Yes, $\geq$ 5% reduction	10
Yes, $<$ 5% reduction	5

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No reduction or not measured 0

Explanatory note: In the United States, food insecure populations are at increased risk for obesity as a result of nutrient, rather than calorie, deficiency. Monitoring of BMI or adiposity in the target population is an important indicator of impact for all food related programs.

*Based on the program's answer to "Program Inventory, Question 2 Type of program," programs will answers different outcome target questions.*

*If the answer to question 2 is "healthful eating," programs answer question 7 and 8.*

*If the answer to question 2 is "active living," programs answer questions 9 and 10.*

*If the answer to question 2 is "both," programs answer questions 7-10.*

### **7 Has the program met its outcome targets for changes in nutrition intake?**

The program has met or exceeded 75% of the total number of outcome targets for changes in nutrition intake	10
The program has met between 50-75% of the total number of outcome targets for changes in nutrition intake	7.5
The program has met between 25-50% of the total number of outcome targets for changes in nutrition intake	5
The program has met less than 25% of the total number of outcome targets for changes in nutrition intake	2.5
No	0

### **8 Regardless of the level of targets set, what is the extent of change for any of the program's nutrition targets?**

> 10% improvement	10
7.5%-9.9% improvement	7.5
5% - 7.4% improvement	5
< 5% improvement	2.5
No change	0

### **9 Has the program met its outcome targets for changes in physical activity behavior?**

The program has met or exceeded 75% of the total number of outcome targets for changes in physical activity	10
The program has met between 50-75% of the total number of outcome targets for changes in physical activity	7.5
The program has met between 25-50% of the total number of outcome targets for changes in physical activity	5
The program has met less than 25% of the total number of outcome targets for changes in physical activity	2.5
No	0

### **10 Regardless of the level of targets set, what is the extent of change for any of the program's physical activity targets?**

≥ 10% improvement	10
7.5%-9.9% improvement	7.5
5% - 7.4% improvement	5
< 5% improvement	2.5
No change	0

### **11 Is there evidence that the results of the evaluation are used to inform future**

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### **program strategy and direction?**

Yes, strong evidence	10
Yes, limited evidence	5
No	0

Explanatory note: “Yes, strong evidence” means that the program consistently uses an established system with a clear timeline to incorporate evaluation results into future program strategy. “Yes, limited evidence” means that the program only occasionally uses evaluation results to inform program strategy or there is not an established system or timeline for this process.

### **12 Has the program demonstrated clear connections between their outputs and health outcomes?**

Yes, clear connections	10
Yes, limited connections	5
No	0

Explanatory note: “Yes, clear connections” means that the program has quantitative or qualitative evidence linking health outcomes with specific program outputs. “Yes, limited connections” means that there were some possible connections between health outcomes and program outputs but lacked substantial quantitative or qualitative evidence linking them.

### **13 Is the program committed to evaluate and to share learning?**

Yes, strong commitment	10
Yes, limited commitment	5
No	0

Explanatory note: “Yes, strong commitment” means that the program has defined processes and time frames to evaluate and to share learning with partner organizations and stakeholders. “Yes, limited commitment” means that the program only occasionally conducts evaluations and shares learning or there are not established processes or time frames for program evaluation and knowledge sharing.

### **14 Are results examined by population subgroups with health disparities?**

Yes, systematically	10
Yes, occasionally	5
No	0

Explanatory note: “Yes, systematically” means that there is a defined process and time frame in place to examine all program results by population subgroups with health disparities. “Yes, occasionally” means that some program results may be examined by population subgroups with health disparities but on an ad-hoc basis.

## **4. Reporting, communication and stakeholder engagement**

*This section evaluates whether the program communicates effectively about the delivery of its strategy and engages stakeholders*

### **A Reporting**

#### **1 How often does the program publicly report on progress?**

Annually	10
Less than annually	5
No reporting	0

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### **2 Quality of reporting: Does it include:**

Names of all funders	1
Level of contributors' funding	1
Activities undertaken	1
Outputs	1
Outcomes/impacts	4
Narrative/explanation of the program	1
Explanation of the challenges faced	1
No reporting or none of the above	0

Explanatory note: Activities undertaken are all of the actions and events used to deliver the program outputs. Examples of activities could include cooking demonstrations, sports events or social media campaigns. Outputs are what happen as a result of the resources used to support a strategy. Examples of outputs could include people reached, number of activities completed, organizations supported, etc. Outcomes refer to what changes or the health impact as a result of the strategy. Examples of outcomes could include changes in knowledge, attitude or behavior or clinical indicators.

## **B Communication**

### **1 Does the program check the quality of communication among partners and stakeholders?**

Yes, systematically	10
Yes, occasionally	5
No	0

Explanatory note: "Yes, systematically" means that the program has established, regularly scheduled procedures to check the quality of communication among partners and stakeholders. "Yes, occasionally" means that the program sometimes checks the quality of communication among partners and stakeholders but on an ad-hoc basis only.

### **2 Does the program provide regular updates on activities and progress to:**

Participants/communities	2
Allied organizations/non-profits	2
Policymakers/public health agencies	2
Scientific community	2
Public	2
Program does not provide regular updates on activities or progress	0

## **C Stakeholder engagement**

### **1 Are structures and processes in place to keep stakeholders engaged, informed and inspired?**

Yes, clearly defined structures and processes	10
Yes, limited structures and processes	5
No	0

Explanatory note: "Yes, clearly defined structures and processes" means that the program has designated personnel and developed systems (such as communication plans and management structures) with clear timelines to support stakeholder engagement. "Yes, limited structures and processes" mean that the program has some ways of engaging stakeholders but lack designated personnel, developed systems or timelines for this work.

### **2 Does the program provide opportunities for stakeholder involvement in program**

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### **review and feedback?**

Yes, annually or more frequently	10
Yes, less than annually	5
No	0

### **3 Which stakeholders are consulted for program review and feedback?**

Experts	2.5
Policy makers	2.5
Community residents	2.5
Community organizations	2.5
Stakeholders are not consulted for program review and feedback	0

Explanatory note: Experts could include academics or health professionals with expertise in healthful eating, food insecurity, active living, chronic diseases or obesity prevention. Policy makers could include elected officials or government agencies responsible for local policy decisions. Community residents could include individual leaders and members of the impacted community. Community organizations could include NGOs and other non-profits working on healthful eating or active living initiatives.