



Orientation Meeting

August 9, 2004



HWTF and Duke Management Team

Commission Staff

Jim Davis, *Executive Director*

Vandana Shah, *Policy Director*

Richard Clark, *Administrative Officer*

Alison K. McLaurin, *Director of Marketing and Public Affairs*

Mark Ezzell, *Community Outreach Coordinator*

Sherry Heuser, *Grants Administrator*

Kristal Kingi-Shearin, *Special Projects Coordinator and Operations Assistant*

Duke Team

Lloyd Michener, *Chair, Community and Family Medicine*

Susan Yaggy, *Chief, Division of Community Health*

Maggie Sauer, *Program Administrator for Fit Together*

Heidi Churchill, *Project Coordinator for Fit Together*

Susanne Schmal, *Project Coordinator for Fit Together*

Cheryl Drescher, *Admin Assistant*

ECU Evaluation Team

Lauren Whetstone,
*Assistant Professor,
Department of Family
Medicine, Research
Division*

Skip Cummings,
*Professor and Division
Director, Department of
Family Medicine,
Research Division*

Kathryn Kolasa, *Professor
and Section Head, Department
of Family Medicine, Nutrition
Services and Patient
Education*

Susan Morrissey, *Research
Associate, Department of
Family Medicine, Research
Division*

Goals

- Reduce barriers in children's homes/communities to healthy eating and physical activity
- Significantly increase the number of school and child care settings that promote healthy eating and physical activity

Goals

- Increase the number of neighborhoods designed to support safe play and healthy eating
- Increase the number of healthcare settings that participate in the prevention and treatment of obesity and childhood overweight

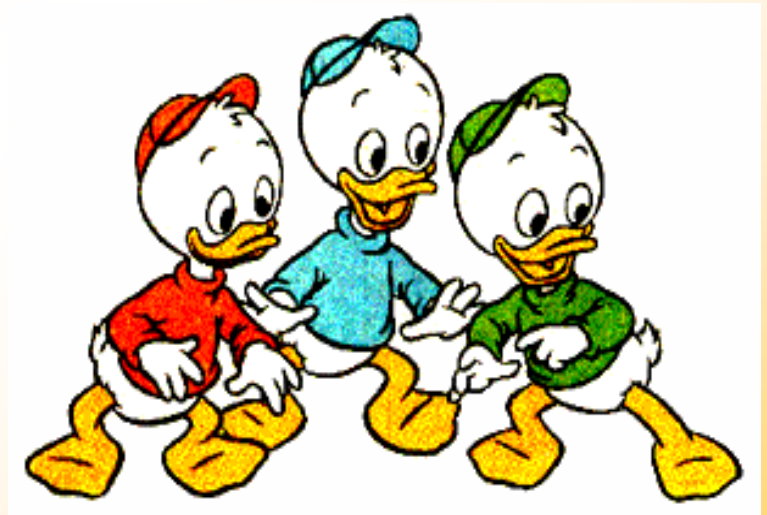
Counties Covered by Grantees



- UNC-TV (all counties)
- NC Academy of Family Physicians (60 undetermined counties)
- North Carolina Division of Public Health (6 undetermined counties)

Primary Technical Assistance Team

- Maggie Sauer –
Program Administrator
- Heidi Churchill – Project
Coordinator
- Susanne Schmal –
Project Coordinator



Introductions

Training Notebook

- How can I use my notebook?
 - Follow along today
 - Keep it for the duration of the project
 - Introduce new employees to project
 - Keep the most current HWTFC Obesity Initiative information in one place

Training Notebook

- What's in my notebook?
 - Background and Contact Information
 - Requirement Information and samples
 - Evaluation Information
 - IRB Information and sample application
 - Obesity Resource Documents and List
 - Documents specific to your project

Requirements

- Activities
- Reports
- Evaluation / IRB

Required Activities

- Conference Calls
- Site Visits
- Annual Meetings
- Technical Assistance Trainings

Calendar of Activities for 2004

January 2004

- Friday, January 30: First Meeting for Phase I Grantees, Thomas Center, Duke University, Durham NC, 10:00 – 3:00

February 2004

- Duke Team begins administrative visits (see calendar)
- Friday, February 20: Monthly Progress Report due to Duke and Monthly Expense Report due to HWTF
- IRB

March 2004

- Duke Team continues administrative visits (see calendar)
- Friday, March 19: Monthly Progress Report due to Duke and Monthly Expense Report due to HWTF
- Wednesday, March 31: Program Conference Call, 10:00am
- IRB

April 2004

- Tuesday, April 20: Monthly Progress Report due to Duke and Monthly Expense Report due to HWTF
- IRB

May 2004

- Thursday, May 20: Monthly Progress Report due to Duke and Monthly Expense Report due to HWTF
- IRB

June 2004

- Friday, June 18: Monthly Progress Report due to Duke and Monthly Expense Report due to HWTF
- Wednesday, June 30, Program Conference Call, 10:00am
- IRB

Calendar of Activities for 2004

July 2004

- [Tuesday, July 20: Six-Month Progress Report due](#) Duke and Monthly Expense Report due to HWTF (Phase I Grantees)
- July 7, 13 OR 19: Evaluation training for all grantees. Site visits to follow immediately after for Phase I grantees.

August 2004

- Friday, August 20: Monthly Progress Report due to Duke and Monthly Expense Report due to HWTF (all grantees)
- Duke Management Team – administrative visits (Phase II Grantees)

September 2004

- Monday, September 20: Monthly Progress Report due to Duke and Monthly Expense Report due to HWTF
- [Wednesday, September 29, Program Conference Call, 10:00](#)
- Duke Management Team – Administrative visits (Phase II Grantees)

October 2004

- Wednesday, October 20: Monthly Progress Report due to Duke and Monthly Expense Report due to HWTF (all grantees)

November 2004

- [Monday, November 1: Annual Meeting, time and location to be determined](#)
- Friday, November 19: Monthly Progress Report due to Duke and Monthly Expense Report due to HWTF (all grantees)

December 2004

- [Wednesday, December 15: Program Conference Call, 10:00](#)
- Monday, December 20: Monthly Progress Report due to Duke and Monthly Expense Report due to HWTF (all grantees)

ACTIVE INTRODUCTIONS

Required Reports

- Monthly Expense
- Action Plan
- Monthly Progress
- Six-month
- Annual

Required Reports: Monthly Expense Reports

[illegible]

Budget Revision Requests

| Health and Wellness Trust Fund Commission | | | | | | | | | |
|---|-----------------|---|-----------------|----------------------|-----------------|----------------------|---|---------------|--|
| Obesity Grant Application Budget | | | | | | | | | |
| | | | | | | | APPROVED BUDGET | | |
| Applicant Agency: | | FIT KIDS NC | | | | | | | |
| Contact Person for Budget: | | U Can Doit | | | | | HWTFC USE ONLY Approved: Richard Clark Effective Date: 1/1/04 Comments: | | |
| Contact Phone: | | (555) 345-2406 | | | | | | | |
| Fax: | | (555) 345-2407 | | | | | | | |
| e-mail: | | ucandoit@willpower.com | | | | | | | |
| Federal Tax I.D. or 501(c)(3): | | 56-6980328 | | | | | | | |
| | | 1. Year 1 starting on or about 1/1/2004 and ending 12/31/2004 2. Year 2 starting on or about 1/1/2005 and ending 12/31/2005 3. Year 3 starting on or about 1/1/2006 and ending 12/31/2006 | | | | | | | |
| | | 1/1/2004--12/31/2004 | | 1/1/2005--12/31/2005 | | 1/1/2006--12/31/2006 | | Project Total | |
| Category | Proposed amount | In-Kind | Proposed amount | In-Kind | Proposed amount | In-Kind | Proposed amount | In-Kind | |
| Direct Expenses: | | | | | | | | | |
| Salary/Wages/Benefits | \$49,656 | \$9,000 | \$50,102 | \$9,000 | \$50,200 | \$9,000 | \$149,958 | \$27,000 | |
| Contracted Staff | \$12,500 | \$6,000 | \$12,400 | \$6,000 | \$12,600 | \$6,000 | \$37,500 | \$18,000 | |
| Other (Please clarify below) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | |
| Subtotal: | \$62,156 | \$15,000 | \$62,502 | \$15,000 | \$62,800 | \$15,000 | \$187,458 | \$45,000 | |
| Other Than Personnel Support (OTPS) | | | | | | | | | |
| Supplies/Material | \$26,500 | \$18,700 | \$27,102 | \$18,700 | \$32,000 | \$18,700 | \$85,602 | \$56,100 | |
| Communication Costs (telephone, postage, freight) | \$800 | \$5,200 | \$800 | \$5,200 | \$800 | \$5,200 | \$2,400 | \$15,600 | |
| Occupancy Costs (rent, utilities, repairs, maintenance) | \$0 | \$30,500 | \$0 | \$30,500 | \$0 | \$30,500 | \$0 | \$91,500 | |
| Media (Advertising and Promotions) | \$6,000 | \$3,000 | \$4,500 | \$3,000 | \$4,500 | \$3,000 | \$15,000 | \$9,000 | |
| Capital Outlay (furniture, equipment, data processing) | \$3,000 | \$5,000 | \$0 | \$5,000 | \$0 | \$5,000 | \$3,000 | \$15,000 | |
| Other (Please clarify below) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | |
| Subtotal | \$36,300 | \$62,400 | \$32,402 | \$62,400 | \$37,300 | \$62,400 | \$106,002 | \$187,200 | |
| Travel Expenses | | | | | | | | | |
| Travel (mileage, transportation, meals, hotels) | \$2,364 | \$432 | \$2,364 | \$432 | \$2,364 | \$432 | \$7,092 | \$1,296 | |
| Meeting Expenses | \$5,000 | \$6,500 | \$8,000 | \$6,500 | \$3,000 | \$6,500 | \$16,000 | \$19,500 | |
| Other (Please clarify below) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | |
| Subtotal | \$7,364 | \$6,932 | \$10,364 | \$6,932 | \$5,364 | \$6,932 | \$23,092 | \$20,796 | |
| Total Direct Expenses | \$105,820 | \$84,332 | \$105,268 | \$84,332 | \$105,464 | \$84,332 | \$316,552 | \$252,996 | |
| Indirect Costs (only if requested) | | | | | | | | \$0 | |
| Total Request | \$105,820 | \$84,332 | \$105,268 | \$84,332 | \$105,464 | \$84,332 | \$316,552 | \$252,996 | |

Required Reports

Action Plans

- Outline of your plan for the year
- Can change – keep it current!
- Discussion tool during initial site visits
- Discussion tool during your project meetings
- Monthly, Six-Month, Annual Reports . . .
all tied to Action Plan!

Sample Action Plan for 2004

Project Name: Sample County Healthy Families Healthy Futures

Goals and Objectives:

Goal 1: Significantly increase the number of school and childcare settings that promote healthy eating and physical activity

Objective 1: Increase the number of 6th - 8th grade students who report getting at least 20 minutes of exercise at least 3 times per week by the end of the spring semester

Objective 2: Increase the number of 6th - 8th grade students who report eating at least one serving of fruit and one vegetable serving during lunch at school

Project Action Plan for 2004

Project Name: Sample County Healthy Families Healthy Futures

Goal: Significantly increase the number of school and childcare settings that promote healthy eating and physical activity

Objective: Increase the number of 6th - 8th grade students who report getting at least 20 minutes of exercise at least 3 times per week by the end of the spring semester

| Strategies | Cost Estimate | Target Group, Including Target Number | Timeline | Roles of Community Partners | Measures of Success |
|--|---|--|---|--|---|
| 1. Form "Spring Action" after-school walking clubs | \$500 per school for advertising, incentives, and copying log books and other materials | At least 2 teachers and 25 students at each of the 3 public middle schools | Clubs will be up and running by the first weeks of April | Schools - provide meeting and walking space WQXP - cover kickoff events on TV Health Dept - help with marketing | o Participation records o Walking logs turned in by students |
| 2. Promote the use of the track at one school for organized family activities during nights, weekends and summer | \$1,000 for advertising, exercise supplies, participant incentives | At least 25 families at Crescent Middle School | Family recruitment will begin in February, open gym and track will start in March and continue through the summer | WQXP will cover the kickoff, Crescent High will provide space, the Health Dept will provide an exercise physiologist for initial assessments | o Written agreement from school officials to allow public to use track o Family participation logs |

Sample Planning Grid

GOAL: Significantly increase the number of school and child care settings that promote healthy eating and physical activity.

| OBJECTIVE 1 - Increase the number of 9th - 12th grade students who report getting at least 20 minutes of exercise at least 3 times per week from 20% to 60% by the end of the spring semester. | | | | |
|---|-------------------------------|---|---|---|
| Strategy 1 - Form after-school walking clubs | | | | |
| STEPS | SETTING & TIMELINE | TARGET GROUP, Including Target Number | HOW WILL YOUR PARTNERS BE INVOLVED? | HOW WILL YOU KNOW IF IT WORKS? |
| advertise in schools | February | at least 2 teachers and 30 students at each of the 3 high schools | Health Dept – coordinate recruitment efforts WRAL – cover kickoff events on TV. Schools – provide meeting and walking space | Pre and post test surveys of all students at the beginning and end of the semester will measure physical activity levels. |
| recruit planning committee (pc) | February | | | |
| first pc meetings | mid-February | | | |
| pc designs calendar of events | by mid-March | | | |
| pc markets in schools and students sign up | by mid-March | | | |
| kickoff event at each school | First two weeks of April | | | |
| | | | | |

Required Reports

Monthly Progress Reports

- Event descriptions, event outcomes, event codes
- Process Data
 - How Many
 - Who
 - What
- Narrative - Anecdotal information
(Include the unusual and fun things too!)

Sample Monthly Progress Report

Strategy: Expand Footsteps to Fitness, an after-school physical activity/nutrition program

Event Description: Two schools have committed to having the Footsteps to Fitness program in 2005.

Event Outcome: Program will be implemented at the schools in 2005.

Event Code: EPO

Strategy: Establish Student Health Advisory Councils in 4 middle/high schools.

Event Description: Met with SHAC advisory at HHS to plan strategy for the new school year, and discuss strategy for surveying grade 9 students for the cohort study.

Event Outcome: Decided that cohort study will be done in grade 9 PE classes

Event Code: X

Additional Narrative:

KidFit Weight Management Program

Staffing this program was still a problem in June. Also, scheduling was more difficult than expected in the summer, with conflicts with vacations and summer school.

Footsteps to Fitness After School Program

The leader of the Footsteps to Fitness program has resigned. Finding a new leader may delay the start of the program in the new school year, but otherwise we do not foresee any problems.

Required Progress Reports

How-When-Where

- Send to your Project Coordinator
- Send by the 20th of each month
- Feel free to call ahead with questions and concerns

Program Evaluation

Why?

Evaluation is important to several groups...

- Grantees
- Funding Source
- Future Projects
- Public Dollars

Program Evaluation

Content

Three components of the evaluation

1. Evaluation of the individual projects
2. Overall outcomes evaluation
3. Evaluation of the Fit Together goals and objectives specified by the Commission in the Request for Proposals

Program Evaluation

Things to Remember

- Grantees will continue to receive specific training and assistance to collect and report evaluation information
- The online reporting system is crucial to the evaluation
- It is a valuable tool for grantees, for the Commission and for legislators to assess progress and achievements

STRETCH BREAK!!!



Institutional Review Board



Institutional Review Board

What does the IRB want to know?

- What are the risks?
- What are the anticipated benefits?
- How are participants chosen?
- What measures will be taken to ensure subjects have enough information?
- How will the privacy of the subjects and the confidentiality of their data be protected?

Institutional Review Board – Why?

- Projects are considered research
- Federal requirement
- Ensure the rights of all participants
 - Safety
 - Confidentiality



Institutional Review Board Options

- Local IRB
- The NC Division of Public Health
- Duke University Medical Center

Institutional Review Board

The Process

- Identify an IRB
- Prepare and submit the required information
- Make any requested changes and re-submit if required
- Keep the Duke Management Team informed

Institutional Review Board

What does this mean?

- 2 to 4 month review process
- Get organized
- Paperwork completed quickly and accurately



Next Steps

- Prepare your Action Plan
- Begin working on IRB materials
- Submit Expense and Monthly Progress Reports – 8/20/04
- Site Visits
- Communicate with us if you run into problems



Nothing is impossible for the
person who doesn't have to
do it himself

We're here to help!