



Challenge Plan Guidance

This document will serve as the roadmap for your Healthiest Cities & Counties Challenge project.

Using insights and information generated by your community's own process, this checklist and planning template will help your team begin documenting your priorities, goals and strategies, team structure, action plan, evaluation plan and budget. By identifying what your community needs to do to accomplish its ultimate goal, this exercise supports your team's effort to develop its approach for getting from where it is now to where it wants to be.

This plan should be considered "living" and dynamic. It is a tool that can be modified as progress is made and new objectives are identified, in consultation with your Challenge liaison.

Instructions:

This document has two parts. The first part is a glossary, checklist and list of resources that you can use to guide your team's discussions as you create a new project plan or to determine if an existing plan needs to be further developed.

Your final Challenge plan should address the questions in the checklist in the format that is most useful to your team. This document can be in paragraph form, bullet points, visual aids, tables, or some combination of all of these. While you may not have an answer to every question, each of the sections listed below should be included in the plan.

The second part is a template that provides you with some options for how to structure your written plan. We have also provided a version of this template with examples of the type of information that you may want to include in each section.

While use of this entire template is not required, there are two sections that you are required to submit in the provided format:

- **Evaluation plan**
- **Budget sheet**

Please submit a complete Challenge plan to your liaison via email by **Wednesday, September 30, 2020**.

Glossary

- **Goal:** A general statement of a broad outcome the partnership would like to achieve as a result of the initiative over the two years. This is your intended long-term (1+ years) impact on systems, policies and community health.
- **Strategy:** A more specific strategic statement describing the method the partnership plans to use to help achieve a goal (or goals).
- **Benchmark measure:** A specific, time-bound, attainable, relevant and measurable statement of a target short- (a few months) to medium-term (about 1 year) outcome. These often include baseline and target metrics, in the case of outcome measures, or counts, in the case of process measures, but may include other measurable performance indicators.
- **Policies:** Formal laws and regulations, organizational policies, informal procedures, processes and guidelines that are developed, adopted and/or implemented by a variety of stakeholders including legislators, government agencies, institutions or organizations
- **Systems:** The combination of relationships, policies, functions, values and connections within and between various stakeholders in a community that determine how resources are produced and distributed in a community and to whom they are available
- **Environmental factors:** Conditions in the physical, social and economic environment of a community, institution or organization that impede or promote individuals' opportunities to achieve optimal health and to choose a healthy lifestyle

Challenge Plan Checklist

Partnership Model

- Who is on your Challenge team and what are their responsibilities?
- What agreements (written or verbal) do you have between team partners, e.g. about team principles, core values, roles, responsibilities, contributions, expectations?
- How will members of the team be accountable for fulfilling their commitments?
- How are members of the community engaged in the team's processes?
- Are there other partners that can be invited to participate in the initiative in the near and longer term?

Mission, Vision and Goals

Mission and Vision

- What is your team's vision for what a healthier community would look like?
- What is your team's mission statement?
- How do you know that this mission and vision resonates with and is a priority for members of your community?
- What policies, systems and environmental factors do you aim to address?
- What are your measurable goals?

Priority Strategies

- What strategies will you use to bring about change in:
 - policies;
 - systems;
 - neighborhoods/communities;
 - organizations/sectors;
 - and/or families and individuals?
- Who stands to benefit from each of these strategies?
- Which sectors and agents of change will own each of these strategies?
- What existing resources can be leveraged to implement each strategy?
- What is the priority level of each strategy based on community input and your team's mission?
- Do you have a program model, framework or theory of change that visually depicts how your planned strategies will lead to the policy and systems changes you aim to achieve in your community?

Evaluation Plan (use required metrics table for this section)

- What are your project's measurable objectives? Based on your planned activities and the data you have access to, these may be:
 - Behavioral objectives
 - Population health objectives
 - Organizational/sectoral objectives
 - Systems-level objectives

- Policy objectives
- What is your baseline and target (benchmark measures) for each of these objectives?
- How will you measure your progress toward meeting these objectives?
- Why are these objectives meaningful to members of your community?

Action Plan

- What specific activities will be implemented under each strategy?
- What community/systems change actions will your team seek to implement for each sector involved (i.e. specific changes to policies or practices)?
- What communications activities will your team engage in to promote the project and participation in planned activities?
- Who is responsible for each of the planned activities?
- How are community members engaged as leaders in each of these activities?
- What is the timeline for implementation?
- What resources will be required to take these actions?
- What will success look like for each of these activities?

Budget (use required budget table for this section)

- How are you planning to use the funds to support the selected strategies?
- Do you have additional funding sources that will support the work outlined in this plan?
- How will you compensate community members for their time and effort?

Resources

The resources contained in this section are suggestions to support your team in developing your Challenge Plan. Please use your discretion as to whether or not the information and examples contained in this section are a good fit for your team and culturally-appropriate for your community.

Planning Tools (Mission, Vision, Goals, Strategies, Action Plan)

- [Community Tool Box](#)
- [Healthiest Cities and Counties Toolkit](#)
- [What Works for Health tool](#)
- [United Way Worldwide Equity Framework](#)
- [Strategic Planning to Achieve Health Equity](#)

Partnership and Community Engagement Models

- [Collective Impact Model](#)
- [Change Package](#) (patient/community engagement)

Conceptual Models and Theories of Change

- [Community Action Model](#)
- [Social Ecological Model](#)

Monitoring and evaluation

- [Well-being in the Nation \(WIN\) Measures](#)
- [Better Evaluation](#)