Capacity Building for Health: A Toolkit for New Orleans' Community Organizations

PREVENTION RESEARCH CENTER
at TULANE UNIVERSITY

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To access the electronic version of the toolkit please visit:

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Thank you!


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About the PRC

Why the PRC created this toolkit:

The PRC hopes that neighborhood associations and other community-based organizations will use this toolkit to improve their organizations’ capacities to address various issues of need including health. The idea was developed out of the PRC’s Ambassador Program and our work with the Fit NOLA Parks and Prescriptions Program. The PRC launched the Neighborhood Ambassador Program in early 2011 to connect neighborhood groups to health-related resources and programs. Support from the PRC, as part of the Neighborhood Ambassador Program, is tailored to meet the self-identified needs of the participating neighborhood organizations to initiate and maintain future health-related activities such as walking groups, health fairs, cooking demonstrations, resources for reducing blight and improving neighborhood safety, exercise classes, community and container gardening, mobile health units, and more. This toolkit provides step-by-step guidance to effectively run a non-profit organization, enabling community organizations to focus on achieving short and long-term goals, and ultimately contributing to stronger and healthier communities.

Our Mission:

The mission of the Tulane Prevention Research Center (PRC) is to reduce or prevent overweight and obesity in the Greater New Orleans Area by addressing the physical and social environmental factors influencing physical activity and diet. The PRC’s mission is accomplished through participatory research; collaboration with community partners and policy makers; communication about environmental factors related to physical activity and diet with public health practitioners, policy makers and community partners; and training of public health professionals, paraprofessional and community members.

Tulane PRC website: http://prc.tulane.edu/
Facebook: https://www.facebook.com/TulanePRC
Twitter: https://twitter.com/tulaneprc
Instagram: http://instagram.com/tulaneprc
Our History:

The Prevention Research Center at Tulane University has been actively involved in New Orleans health issues since 1998. During its original funding cycle, the center focused research on a variety of environmental issues, most significantly reducing childhood lead exposure. That research led to the Childhood Lead Poisoning Prevention Program, which resulted in important changes in public policy. Adolescent asthma and mercury exposure were also among the environmental issues addressed as a part of the initial funding cycle.

In 2004, the PRC was funded for a new 5-year grant cycle through the Centers for Disease Control and Prevention (CDC). For this grant cycle, however, the PRC turned its focus toward the epidemic of obesity, which affects the entire population, but disproportionately affects low-income residents to a higher degree. The core research primarily focused on the Partnership for an Active Community Environment project.

In 2009, the PRC was funded for another 5-year grant cycle through the CDC to address the obesity epidemic through multipronged research on New Orleans changing food environment. Our investigators employed creative, community-based, participatory research techniques to create a healthier physical and social environment for New Orleans residents, especially in light of our changed environment.

In 2014, the PRC was again funded for a new 5-year grant cycle through the CDC. The overall goal of this grant’s Applied Public Health Intervention research is to improve the weight status of residents of one New Orleans neighborhood compared to residents of a control neighborhood.
Fit NOLA Parks & Prescriptions Program

In collaboration with the City of New Orleans’s Fit NOLA initiative, the Fit NOLA Parks and Prescriptions program works to create synergy between parks, farmers markets and neighborhood clinics by offering residents access to free, fun physical activities; local and nutritious foods; and two prescription programs supported by participating community clinics. The Fit NOLA Parks & Prescriptions Program was made possible with funding from a Challenge for a Healthier Louisiana grant from the Blue Cross and Blue Shield of Louisiana Foundation and with matching funds from Chevron and additional partners.

**Fit NOLA Parks activities:**
- Provide free, family oriented physical activity classes
- Increase park security through the New Orleans Police Department during key activity times
- Discourage tobacco and alcohol use within the parks
- Offer healthy foods and drinks at the park concession stands
- Allow for the redemption of Fit Scripts that are prescribed by doctors at participating clinics

**Fruit and Vegetable Prescriptions (Rx) program:**
- Works with community clinics to train providers on how to prescribe the Fruit and Vegetable Rx
- Meets and educates prescription participants at the farmers markets about how to redeem their prescriptions and how to prepare their newly purchased fruits and vegetables

Additional Partners: New Orleans Police Department, Daughters of Charity Services of New Orleans, Ruth U. Fertel/Tulane Community Health Center, Hollygrove Market and Farm.
How to Use This Toolkit

Binder intent:

The intent of this binder is to help lead neighborhood associations and other community-based organizations within New Orleans in the right direction, fostering growth and sustainable development. Often times when communities have large pressing issues (such as neighborhood blight), it can be difficult to focus on being healthy and active. The information in this guide will provide communities with the tools needed to tackle those larger issues, and enable you to start focusing on health. Specifically the binder covers how to establish a good organizational foundation, gain and keep members, successfully start and finish projects, incorporate community input, and develop a culture of health.

How to use it:

Whether your organization is just beginning or already well established, there is something in this binder for you. Browse through the following table of contents to see what sections most apply to your organization and gauge where you are in the development process. Even successfully run organizations can benefit from the presented material by assessing and reflecting on their current policies and practices. There is always room for improvement!
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Chapter 1: Defining a Community

What is a neighborhood?

A neighborhood can be defined as homes within a certain relatively small radius, homes within a larger area of similar style and market value, or the area adjacent to certain establishments (i.e. churches, schools). You can define a neighborhood by geographic location or by social similarities.¹

Cities generally define neighborhood boundaries based on measurements used by the U.S. Census Bureau. This provides an easy way for your organization to decide who is in your neighborhood when planning programs and projects. Something to keep in mind is that residents may have a slightly different mental map of their neighborhood. New Orleans has 76 neighborhood designations, and 13 planning districts.¹

What is a community?

- A community is a group of people who share a common place, experience, or interest.
- Community health refers to the well-being of everyone in a community.
- Community capacity designates the resources and abilities of a community to effect change, i.e. the ability of community members to make a change over time and across different issues.
- Examples of community change are developing a new program, modifying an existing one, bringing about a change in public policy, adjusting a practice related to the group's mission, or improving the physical environment.

Communities will differ based on their specific characteristics. To create permanent community change your organization should assess what those unique characteristics are in your community. These include things such as: demographics, hopes and expectations of residents, job and family demands, financial resources of individuals and the community as whole, and the political climate. An assessment should be performed using three general steps.²

1. Define your community - "Think about the target audience and the broader community that interacts and influences that audience."² The keys to defining your community are knowing your target audience, defining geographic boundaries, and
identifying elements that interact with the target audience in a specific geographic location. For example does your community consist of young parents and their children who interact with decaying parks, cracked sidewalks, and other unpleasant physical features on a daily basis?²

2. Gather information - This includes "collecting community data, community opinions, community resources and assets, and information on the community’s policies and environment."² During this data collection you are learning about your community and fine tuning who you'll be targeting.

3. Summarize and report information - In this final stage you will summarize the information you've gathered in the previous two stages. You should not begin prioritizing issues in the community just yet, that will come later. This exercise is solely about understanding the community and gauging what the needs are.²

*Find more information about these steps in the "Assessing Community Needs" section of the binder.

Once you have assessed your community, you can begin affecting community health and development through the following steps:

- Targeted mission
- Action planning
- Leadership Development
- Resources for community organizers
- Documentation and feedback
• Technical assistance
• Making outcomes matter

Community design and public health:

There are numerous ways in which a community-serving organization can positively impact the health of its residents. Programs, interventions, and policy change are all ways in which to do this. "Health" encompasses physical, social, and environmental well-being. The examples below are merely an overview of the impact you can have. This theme is expanded upon within the "Health of the Community" section of the binder.

• Increasing physical activity through creation of more usable parks, accessible biking and walking trails, safe transportation systems, and restructuring other aspects of the built environment.
• Increasing healthy eating by educating the public and making fresh food affordable and more available.
• Increasing community greening via creating more green space, reducing pollution and noise, making neighborhoods safe and pleasing to the eye, and opening more farmers markets.

No matter how small your organization might be, how limited the funds are, or how short-staffed you are, you have the ability to positively change your community in a big way! Your best bet to having a successful and sustainable organization is to create a solid foundation from the start. The next section includes the necessary groundwork to start strong.
References:


Chapter 2: Groundwork

Vision, mission, objectives, strategies, and action planning (community toolbox):

Most organizations begin with big dreams and goals of widespread change. In order to accomplish these, strategic planning can be used. VMOSA (vision, mission, objectives, strategies, and action planning) is a planning tool that can be used by any new organization or at the beginning of any new initiative. This tool enables organizations to create a solid foundation from the start and lays out steps needed in order to accomplish goals. Both short-term and long-term goals can be analyzed using this system.¹

VMOSA enables organizations to come to agreement on your main focus and decide what the necessary steps are for the organization to take. Through this process the organization can create vision and mission statements involving community members and those who will be most affected by your organization’s work. By including input from the community your organization is much more likely to address actual needs in the community and more likely to engage the community in future projects, programs, and interventions.¹

The VMOSA planning tool should be used when starting a new organization, but also when:

• Starting a new large-scale project or initiative
• Beginning work in a new direction
• An ongoing effort enters a new phase
• Attempting to revive an old initiative that previously lacked focus and momentum
• Applying for new funding¹

1. Vision statement (the dream): The first part of VMOSA is creating your vision statement. “A vision communicates what your organization believes are the ideal conditions for your community - how things would look if the issues important to you were perfectly addressed. This utopian dream is generally described by one or more phrases or vision statements, which are brief proclamations that convey the community’s dreams for the future. By developing a vision statement, your organization makes the beliefs and governing principles of your organization clear to the greater community (as well as to your own staff, participants, and volunteers).”¹

Vision statements should be:

• "Understood and shared by members of the community
• Broad enough to encompass a variety of local perspectives
• Inspiring and uplifting to everyone involved in your effort
• Easy to communicate - for example, short enough to fit on a T-shirt”1

Some examples: "1. Healthy Children, 2. Education for All, 3. Every House a Home”1

2. Mission statements (the what and why): Once you have created a vision statement, you can begin coming up with a mission statement. This is a statement describing what the organization is going to do and why. Essentially this is the organization’s statement of purpose. Mission statements are action-oriented and are more concrete than vision statements. They may refer to problems your organization wishes to solve and very generally states how it will solve them.1

Guiding principles:

• Concise: should be no more than one sentence
• Outcome-oriented: explain the general proposed outcomes of your organization
• Inclusive: while discussing goals state them broadly without limiting strategies or parts of the community that can be involved1

Some Examples: 1. "To create a thriving African American community through development of jobs, education, housing, and cultural pride." 2. "To develop a safe and healthy neighborhood through collaborative planning, community action, and policy advocacy."1

If you feel your vision and mission statements are too short to fully articulate your points, creating additional guiding principles may be helpful.

3. Objectives (how much of what will be accomplished by when): These are "specific measurable results for the initiative’s broad goals. An organization’s objectives generally lay out how much of what will be accomplished by when."1

Types of objectives:

1. Behavioral: "these objectives look at changing the behaviors of people (what they are doing and saying) and the products (or results) of their behaviors.”1

2. Community-level: "These are related to behavioral outcome objectives, but are more focused on a community level instead of an individual level.” 1

3. Process: "These are the objectives that refer to the implementation of activities necessary to achieve other objectives."1
*Note: These objectives are not mutually exclusive and organizations will most likely develop some of each.

4. Strategies (the how): "Strategies explain how the initiative will reach its objectives. Generally, organizations will have a wide variety of strategies that include people from all different parts, or sectors, of the community. These strategies range from the very broad, which encompass people and resources from many parts of the community, to the very specific, which aim at carefully defined areas." ¹

Types of Strategies:
1. Providing information and enhancing skills
2. Enhancing services and support
3. Modifying access barriers, and opportunities
4. Changing the consequences of efforts
5. Modifying policies¹

5. Action Planning (what change will happen; who will do what by when to make it happen): "Describes in great detail exactly how strategies will be implemented to accomplish the objectives developed earlier in this process. The plan refers to specific changes to be sought and specific action steps necessary to bring about changes in all relevant sectors of the community." ¹

Action planning includes:
- "Actions steps: what will happen?
- People responsible: who will do what?
- Date to be completed: timing of each action step
- Resources required: resources and support (both what is needed and what is available)
- Barriers and resistance: with a plan to overcome them
- Collaborators: who else should know about this action?" ¹

After you’ve completed VMOSA, test it out and revise it as necessary. As you receive feedback from your community and those working on the project, items may need to be added and subtracted from your VMOSA.

Finding a meeting space:
Before your organization can make change happen, you must first find a space to hold your meetings. Depending on the type of organization, where you meet will vary. Potential meeting places may include: community centers, churches, schools, libraries, town hall, conference rooms at hotels.

Things to consider when choosing a meeting space:

- Is it within your budget?
- Is the space open on the day you plan to meet?
- Is the particular time of day available and for the length of time you require? Is the location flexible in case you need to change meeting time one week?
- Are there other meetings scheduled around your timeframe, potentially causing delays to the start of your meetings or rushing to finish them?
- Is the space easily accessible for attendees? Is there ample parking? Is there wheelchair-user accessibility?
- What is the atmosphere like? Is there comfortable lighting, temperature, furniture?
- Will you have room for all members and the public to attend?
- Can the space be used by your organization at times other than scheduled meetings?
- Is there any equipment that your group will need (i.e. a projector, wireless internet)? Does the space accommodate this?
How to run a successful meeting:

Phase 1: Planning the Meeting
Proper planning of a meeting will help you avoid: wasting meeting time, wasting attendees' time, and having a boring pointless meeting that leads nowhere. All of these can ruin a meeting and hamper people's spirits. They may not return to the next meeting.²

- **What is the meeting goal?** - For example, is it to start planning a new project? You must have a clear goal for each meeting to keep it moving forward and to make good use of everyone's time. Creating an agenda will help with this. Be sure to complete any research that needs to be done prior to the meeting.²

- **Who should attend?** - When scheduling meetings, try to have them at a time when everyone can attend, especially your board members or key organization leaders. Although it is great when everyone is available to attend, not everyone may need to attend every meeting. You can save people's limited free time by only asking them to come to meetings when absolutely necessary. You can relay required attendance information via email or telephone to all members. Let general members (not board members) and the general public decide if they are interested in what is on the agenda.²

- **Plan with other members** - Members of the organization can help you plan agendas for meetings. This makes creation of the agendas easier, faster, and makes members feel appreciated.²

- **Craft a good agenda** - Having an agenda can keep the meetings flowing and avoid getting off track. Providing members the agenda via email, telephone, or printed flyers before the meeting allows them to add anything they want and come prepared with material to contribute. To make an effective agenda, allot a specific amount of time for each agenda item. Give those who are presenting material at the meeting (or leading a discussion) ample time to prepare. Everything that will be discussed at the meeting should be present on the agenda.²

Phase 2: Setting up the Meeting

- **Start and end on time** - Even if there are only a few people in the room, it is critical to start a meeting on time. People will arrive late or not show up at all in the future if they know the meetings start late. Since members lead very busy lives, ending on
time is also very important. Set up a consistent meeting schedule; members will set aside that time regularly to attend.  

- **Have attendees sign in** - Having a sign in sheet is important for keeping track of who attends your meetings. It also is a way to keep membership lists up to date. Things to include on your sign-in sheet are: name, address, email, and phone number.  

- **Make sure all members are comfortable** - The space where you hold your meetings should be comfortable and conveniently located. Arrange for carpooling or transportation assistance for those that may have trouble getting to the meeting. Try to arrange seating in the meeting space so it is conducive to business (circles are a good idea).  

- **Informal time for members is key** - Before and after meetings let attendees socialize with each other. This is also a great time to recruit volunteers for projects.  

**Phase 3: Running the Meeting**  

- **Introductions** - Having everyone introduce themselves is a great way for people to get to know each other. Introduce the board or key organization members, any guest speakers, and of course yourself. Ice breakers at the start of the meeting or when several new members are present also helps. This activity could be as simple as having everyone share something about themselves or why they are interested in your organization.  

- **Agreement on agenda and rules** - Organization members should be able to give feedback on the agenda and rules for the meeting. Rules may include, moving on to the next agenda topic after a certain amount of discussion time has passed.  

- **Keep people on track** - During meetings people can easily get off track. As a leader, you must pull them back into the topic at hand respectfully. Having an agenda comes in handy here.  

- **Watch the time** - If the group is taking too long on an issue you must ask the group if they would like to spend more time on it or continue the conversation at a later date. Your meeting agenda should have allotted a certain amount of time for each item.  

- **Summarize discussion** - After you have finished discussing each item on the agenda, summarize what was said before you move on to the next item.
• *Encourage participation* - Engage the entire audience. Encourage everyone to contribute to the conversation.²

• *Rotate who leads meetings* - As leader you must pay attention to group dynamics. This is a skill that must be practiced in order to get better at it. You will gain more confidence in your ability to lead groups and take charge. The same person does not need to lead every meeting however. Create new leaders by allowing others to practice leading the meetings.²

**Phase 4: Following up on the meeting**

• *Gather feedback from the group* - For everyone to get the most out of the meeting, complete some follow-up steps. See what people thought of the meeting and what they felt could be improved. This can be accomplished by sending out a follow-up email to those that attended (your sign-up sheet comes in handy here). This does not have to be done after every meeting, but you should make sure that everyone is clear on next steps, personal assignments, and the next meeting date.²

• *Do necessary follow-up* - Make follow-up phone calls, send emails, and have personal contact after the meeting as necessary. This can be done by the meeting leader or by someone else in the organization.²

• *Summarize the meeting* - Recording meeting minutes may be helpful for some organizations to track what was discussed, what decisions were made, and ideas for the future. The organization’s secretary can do this or a volunteer.²
Prevent meeting interruptions:

- Listen to what someone is saying. Repeat what they are saying back, so they understand you are listening.\(^2\)

- Remain in your role as meeting leader, do not become a participant.\(^2\)

- Do not act defensively to comments made. Taking a step back and analyzing the situation will avoid overreaction on your part and possible loss of respect from organization members and visitors.\(^2\)

References:


Chapter 3: Attracting and maintaining members

Board members:

1. **Building a board:** Before you can start recruiting general members to grow your organization, you must develop a solid foundation by building a board. This means recruiting qualified members to become a critical part of your organization’s future. You will need to advertise the board positions available and determine criteria for screening potential candidates.¹

- *Advertising the role* - Depending on the board positions open and the age of the organization, you may be recruiting internally (from within) or externally (from the general community). Your recruitment message should be designed to attract a specific type of person. Think like the person you’re trying to attract. If recruiting internally, sell the position to current members within the organization. There might be some potential candidates there already. If recruiting externally, focus your advertising in places this person is likely to go and on sites the person is likely to visit. Include benefits of becoming a member in the promotion. When using a letter as means of invitation, showcase the organization and its accomplishments. Writing a letter to a potential board member can be the first step in recruitment and catching their attention. The following are additional tips to use when letter writing.¹²

  - Explicitly state why you are writing to the potential board member. The letter must be direct and state why the organization is looking to recruit the recipient as a new board member. For example is it to replace a current board member with expired terms or to expand membership by creating a more diverse team?²

  - The letter must describe the organization’s purpose. This includes some information on the organization’s accomplishments, how promises and expectations for improving services are fulfilled, and what the organization’s presence is in the community. Explain how the potential board member’s interests align with the organizations.²
People like to know how much time they can expect to spend with an organization. Everyone has a lot to do in a limited amount of time. Being able to provide potential members with an estimated time commitment will be helpful. Include an estimate of time s/he can expect to devote to board meetings, committee meetings, conferences (if applicable), and other functions/events that board members are expected to attend. A good measurement to provide is the amount of time in hours expected each month.2

Money is another large factor in deciding to become a board member. Certain organizations require the member to spend personal funds, whereas others reimburse members for money spent. It is wise to relay any expenses the board member can expect to pay out of pocket ahead of time. This also includes money board members are expected to give to charities (if applicable). If the board position is paid, you can state that in the letter too.2

Through the letter or on its own, you can invite potential board members to visit with the organization. They can get a feel for the environment, the work you are doing, and if they would be a good fit. This goes both ways, allowing you to see if the candidate is a good fit for the position.2

- **Providing additional information** - Since you probably cannot fit all the information about the position on one advertisement, you may want to redirect people to your website (if you have one) for a full description. You may also consider listing a contact on the advertisement. Potential board members may wish to talk to someone currently on the board about joining. This contact should have a good understanding of the organization and be able to answer any questions in a timely fashion.1

- **Choosing a new member** - There are several different ways to decide if a candidate is right for your board. A formal interview may or may not be appropriate. It depends on the position open, how the member will ultimately be elected, and if recommendations about the person are needed prior to a meeting. If a formal interview is not appropriate you can invite them to an organization event to get a feel for them, and allow them to get a feel for you.1

- **Meeting observation** - To give potential board members an idea of what your organization is about, allow them to sit in on a meeting. They can see how you make a difference in the community and what issues are discussed.1
• **Payment of Board Members** - As stated in the letter writing tips, be clear about the money. Is the board position paid, or are they expected to act as volunteers? Generally, board members who are being paid are legally more accountable than those simply volunteering. Depending on the type of organization you are, there may be issues paying board members and remaining legally registered the same way. Finally, will board members have out of pocket expenses, or does the organization cover these? 1

**2. Engaging board members:**

In order to have a successful organization you will need to have a board full of enthusiastic members. Although they might be excited at first, you need to keep them engaged throughout their service. There are many ways to do this.

• **Make it easy** - Board members should be a certain type of person used to being busy and achieving things quickly. In order to be effective, members must understand how the organization functions. A good way to accomplish this is through a detailed orientation. It should include organization history, who the staff and board are, what the committees do, and where organization needs lie. This will give board members the ability to see where they can best help. For members to stay up to date, provide them with current goals you are working toward, feedback on their work within your organization, and a wide variety of opportunities for them to get involved. 3

• **Work them** - Board members must see themselves as critical parts of the organization. You should work them hard. They need to know they are making a difference, or else they will go somewhere else. Board members are not looking for a resume boost, but are looking to use their talents to make a difference. Board members might not be able to attend every meeting, but can work on their own time. 3

• **Show them the good, the bad, and the ugly** - Board members should be shown all parts of the organization, especially the challenges. If everything is presented as perfect, members will think their help is not needed. 3

**3. Keeping board members motivated over the long haul:**

• **Hold board meetings only when necessary** - Only meet when absolutely needed to avoid wasting members’ time. Having an agenda to stick to helps keep meetings short and on track. Rather than reporting on what members have done or plan to do, meetings should only raise issues that require board action. This will encourage
members to attend meetings. Keep the agendas unpredictable to encourage attendance, but brief members ahead of time on the items to be discussed. Don’t tell members the order in which items will be discussed. This discourages people from just showing up when certain items of importance are scheduled for discussion. During times of crisis communication between members is crucial to keep them focused. Throughout the year, communication should be maintained as well.4

- Letting go - You may consider mandatory rotation of board members after serving a certain number of terms. You may ask members to take a year off, however problems getting them to come back is something to keep in mind. When members wish to leave on their own, do an exit interview to find out their reasons for leaving.4

**General organization members:**

Once you have established a solid board of qualified and enthusiastic individuals, you can begin recruiting general organization members. Understand that people become a part of organizations for several reasons. They may want to get involved to feel they are positively contributing to society, they may want to meet new people and make new friends, they could be trying to develop better leadership and public speaking skills, or they may just want to have fun. As much as they need you, you need them! Everyone brings something unique to the table, whether it be a talent, area of knowledge, or a life experience. New members bring in a fresh and unique perspective to the organization.5

Are there certain types of people you are particularly interested in? Perhaps a group of people with a specific skill set would be beneficial to the work you are doing. Create a profile of your ideal member. Of course everyone can bring something to the organization, but it will help target specific people who will benefit the organization the most by having a profile on hand. When talking to a potential member, listen to what they have to say. Let them know how their talents can be used within the organization.5

**Ideas to help you recruit members:**

1. Have current members (board members included) bring guests to meetings whom they think would be interested in your organization’s work.
2. Advertise in newspapers, on local TV, and the radio about the organization, upcoming events, and meeting times and locations.
3. Create a positive image for your organization within the community (good name recognition).
4. Have clear goals and a strategic plan to show potential members you are organized.
5. Contact local businesses to advertise with them (i.e. doctors' offices, grocery stores, libraries).
6. Leave your meetings open to the public for anyone potentially interested to see what you are all about.
7. Alternatively you could have meetings only open to members, encouraging people to join.
8. Place customized bookmarks in library books.
9. Create a handout for people to take home detailing what your organization does and why they might want to get involved.
10. Work on projects that benefit the community to draw interest.
11. Hold a reception dinner or small get together for potential members.
12. Print business cards with meeting location and time on them.
13. Consider perks for members, incentivizing people to join.
14. Make prospective members feel important and valued.
15. Set aside time at the end of a meeting for social interaction.
16. Recruit members at your community events.
17. Create incentives or a reward program for current members who bring in new members.
18. Design a website for prospective members to view (this is helpful for board members, the rest of the community, and funders to see what you're doing as well).
19. Have meeting attendees sign-up on a mailing list, send out invites to events and ways to become involved through group emails. You may also opt to use a paper mailing list.
21. Set an example as the leader by bringing in new members.
22. Draw people in by incorporating exciting things into your meetings. For example, invite a guest speaker and advertise their appearance ahead of time.
23. Follow up with those who attend your meetings. See if they would be interested in being more involved or coming to more events and meetings.

24. Provide snacks at meetings, complementary coffee, etc.

25. Distribute member packets/brochures with any partner organizations you may have.

26. Advertise and be present at local sporting events.

27. Hold joint meetings with other organizations to reach a larger audience (there is no reason people cannot be involved in both!)

28. Host outdoor events, have a booth at festivals and fairs.

29. Consider adding a blog to your website for sharing organization progress and interesting experiences.

30. Write letters to the local newspaper or magazine about current initiatives.

31. Publicize success, events, and elections.

32. Have an organization newsletter to pass around.

33. Host a recruiting event, possibly pairing up with several organizations.

34. Do some self-advertising by wearing organization pins, shirts, bumper stickers, etc. around town.

35. Mention your organization at other groups’ meetings.

36. Develop a welcome letter from the President to hand out to new members.

37. Recognize new members in an organization newsletter.

Once you have found new members, hold some type of ceremony or induction to make them feel welcomed. This does not have to be fancy, just something to show appreciation and inclusion. Members are more likely to contribute and remain with the organization when they feel a part of it. Remember the more people in your organization the better.

**Keeping general members interested** in your organization is similar to keeping board members invested and for attracting members in the first place. Below are some additional tips for maintaining members over the long haul.

1. Honor members that went above and beyond with awards.

2. Have members give talks at other organizations (allow them to branch out and feel useful).
3. Conduct membership satisfaction surveys to see what members want out of the organization, why they are a member, and what they think the organization could be doing differently.

4. Contact members that have left the organization within the past few years to find out why they did.

Evaluating board members: Self-evaluations are a good way for members to provide you with feedback without the awkward feeling of evaluating other members. They can state strengths they brought to the table and weaknesses they can work on. Evaluations allow for reflection on work members have done and all that they have accomplished with the organization. This process can be extremely motivational.

Committees:

To best tackle your organization’s big vision and goals you will need to divide up the manpower you have. Members can branch off into committees to work toward different goals that together make up your vision. This will allow everyone to feel involved and simultaneously contribute. Ways to do this are explained below.

What is a committee? A committee is a group of people within an organization who work together to accomplish a common organizational goal. The goal may not have an endpoint, but might be continuous maintenance of something (such as sending newsletters) or keeping the organization running smoothly (such as fundraising). Committees work as a whole with all members sharing responsibility for actions taken and decisions made. Each member must act with selflessness, integrity, objectivity, accountability, openness, honesty, and leadership.

To create committees think about the various goals the organization has. You can then form a committee to focus on one or two particular goals. Allow members to join committees based on their areas of interest and individual talents.

Keys to successful committees:

- **Strong leadership** - Each committee must have a leader to set goals, create deadlines, and hold others accountable. They should write out individuals’ responsibilities in a clear fashion.
• **Effective meetings** - Just as general organization meetings, committee meetings should have an agenda. Attendees must come prepared with any work to present and/or research necessary to communicate with others. Meeting minutes/notes can be taken, agreements recorded, and next steps documented.7

• **Delegation** - When working in a large committee there may be subcommittees to further delegate tasks to. Decide what is crucial for committee members to do, and what tasks can be completed by someone else. Remember you are only delegating the task, not the responsibility. The outcomes of subcommittee action ultimately falls on the larger committee.7

• **Broad involvement** - All committee members should be encouraged to participate in meetings and put their individual skills to use.7

**Committee member responsibility:** When you join a committee, there are several things you are committing to in addition to completing specific project goals.

• All work must abide by organization values and mission
• Sufficient time and energy should be committed to trustee duties (this depends on the type of organization and your position within it)
• Action must be done with integrity, without allowing personal conflicts of interests to interfere7

**The Management Committee:** Your board members can be thought of as a management committee. Specifically they are a decision-making committee leading the organization and helping move it forward. Members of this committee have both individual and committee roles to fulfill with different duties and responsibilities. Each members’ responsibilities should be written out to eliminate confusion and reliability issues. This applies to all committees within an organization. Your management committee in particular may need assistance and support from other members to fully function. They will have a lot on their plates and may need help collecting the necessary information to make decisions. They may end up delegating tasks to other committees or subcommittees.7
References:


Chapter 4: Assessing community needs

You are probably eager to start creating new projects and programs for your community; however to optimize your efforts it is wise to first define the community you are aiming to help. This section walks through recommended steps for defining your community, identifying needs, determining community readiness, and finally how to move forward with projects.

**Defining your community:**

The set of questions below are for you to use to define your community. You will want to identify a target audience and those who influence that audience. The audience you define will naturally change over time, so do not be afraid of revisiting this section.

1. **Who is your target population?** Start broad by asking yourself what type of people are in your community. Then within that, who are you looking to target through projects and programs? Is it young children, the elderly, college students? Some organizations will focus on a certain group of people based on where funding is coming from or based on an internal policy. ¹

2. **In what geographic area is your target audience?** Where is your target audience? Are they within a certain neighborhood of the city, multiple neighborhoods in the city, or scattered throughout? Are you trying to reach people in multiple cities, parishes, etc.? ¹

3. **Describe some of the basic demographics you know about this community.** Is the community rural or urban, high-income or low-income, of a particular ethnic background, or of a certain age range? Are unemployment and poverty rates high in the community? Answering these questions will allow you to understand who you are working with. ¹

4. **What major organizations, agencies, and services exist in this area?** Are there lots of schools, businesses, hospitals, parks and other recreational areas, counseling services, churches, local media, strong local government, and other community organizations? Identify these types of organizations and services for future possible outreach and partnerships. They will also give you a good idea of what is lacking in the neighborhood that you could work to improve. ¹

5. **What are some regularly-scheduled community events that people attend?** Does the community host festivals, sporting events, back-to-school events, fairs, etc.? These are
all potential outreach locations and you can learn more about what the community is currently doing.¹

6. **What are the patterns of social interaction in this area?** When people get together what are they doing and where are they doing it? Are there clubs, community gardens, intramural sports teams, worksite meet-ups, neighborhood gatherings, or strong tight-knit family connections?¹

7. **Are there resources outside your immediate community that provide support for your community?** Things like this might include large supermarkets, hospitals, shopping malls, recreation centers, worship houses, etc. Do people in your community leave for another town to use a resource? If this is the case, you may need to gain access to those services. You can look at this from the opposite prospective. Do people from other communities come to yours to use a resource? If so, you need to consider who those people are that are coming to utilize it.¹

8. **Who are the opinion leaders in your community?** Opinion leaders might be individuals, organizations, community groups, key decision-makers, or power structures. Different parts of the community will most likely have different opinion leaders. You will want to know who these people are to use as a means of access into the community. They are typically well liked and trusted, with a significant group of followers. They know a lot about the community and possibly where areas of improvement lie. If you can get them on board with your efforts, they may be able to rally the community's interest too.¹
Once you have answered all eight questions, summarize your findings in a few sentences. This will give you and all those in your organization a good idea of who and what you are working with. Now you are ready to begin assessing your community for changes to make.

**Gathering information on community needs:**

In order to start positively changing your community, you must first decide what needs to be changed. After you have defined who is in your community, you can begin collecting information from them on certain pressing issues you may want to address. Getting feedback from the target population and information on the physical environment of the community will be very helpful. To obtain "community opinions," you may reach out to certain groups of people or existing smaller target organizations. You want to understand the problem from the point of view of those who are affected by it (community members) and may be part of the solution (policy makers). Understanding the physical environment tells you what resources are available and where any gaps are.\(^1\)

**Utilizing Focus Groups:**

These are discussion groups made up of people from a small subunit of the community, usually from your target group. The focus group meeting is led by a moderator who guides the meeting along by using a prepared list of questions. The groups are relatively small containing between 8-12 participants, with the purpose of collecting group opinions, attitudes, values, and ideas.

There are several advantages of focus groups including the "snowball effect", one person comments which leads to other people giving input. They can also explore feelings, attitudes, and opinions in depth. Nonverbal reactions can be observed. Focus groups are limited because the results cannot always apply to different or bigger populations. Focus groups are designed to provide direction to go in, not specific steps to follow. You generally have less control over the group’s discussion than you would if interviewing people one on one. Interpretation of the results is completely subjective. Results will also vary based on skills of the facilitator, or the person directing the conversion in the focus group.\(^1\)

Some good reasons to use focus groups include identifying the most important issues to the population, assessing target audience needs, gaining ideas for potential projects and programs, developing instruments for quantitative or qualitative research, and testing out project concepts/materials.\(^1\)

**Sample Focus Group Questions:**
Try reviewing the following list of sample focus group questions to get an idea of the types of questions you might want to ask. The example questions provided are in regards to living healthy. Depending on your organization's goals, these questions may not be relevant to you. These are merely an example of the types of questions one could ask at such a meeting.

1. "Please tell us about yourself: (a) your first name; (b) what city or town you live in; (c) your household; and (d) a little bit about yourself.
2. What do you do in your free time? (a) Do you consider physical activity to be relaxing?
3. What are some of the things you do with your friends and family in your free time? (a) Do you engage in different activities with your friends than with your family?
4. Do you use any public facilities or programs in your city/town? What do you use? (a) If no - Why not?
5. What steps, if any, do you take to stay healthy? (a) Both through physical activity or food choices? (b) How do you decide what to eat at home?
6. Do you ever go out to eat at restaurants or fast food places? (a) How do you decide what to eat away from home?
7. What do you consider to be a healthy meal? (a) What healthy food choices are available to you (at home and away)? (b) What are the barriers to healthy food choices?
8. Why do you eat the food and drinks that you do? (a) What informs your food choices? (b) Where do you get information about food?
9. Are there changes that could be made in your community to help people make better food choices?
10. Describe some of the activities, chores, and other responsibilities, which you do around the house on an average day.
11. If you work, how active is your job? How much time do you spend sitting?
12. How do you get around town or to work on a typical day? Car, bike, walk, etc. [public transit, family members, friends]
13. Do you get enough physical activity in the average day - why or why not?
14. Are there any barriers that keep you from being more active, and if so, what are they?"
Alternative assessment tools:

After you have conducted a focus group, you will review the results. If you feel certain important data is missing, you might try some alternative collection methods. Try a paper survey or personal interviews to get answers to specific questions you want to ask. Regardless of the data collection tool, make sure you are questioning people who are representative of your target population. When coming up with questions to ask be sure there are not too many close-ended or leading questions. The person who is conducting interviews or distributing surveys should be trained and given specific instructions on how to do it. Lastly lay out a detailed plan for analyzing the answers to the focus group questions.1

Learning about community decision-making:

The following three worksheets are to assist you in identifying who makes decisions in your community, when community meetings take place, and who the informal leaders are. These worksheets are useful to use after community needs have been assessed and you wish to move forward creating a project, program, or intervention. You will need to understand what it takes to get community leaders on board with your proposals, to receive funding, and to time your projects around other organizations you are working with who may only meet a few times per year. To complete the worksheets you can visit government websites for information. You can also check with the local library or call local government offices to speak with a staff member for information. The informal leaders worksheet allows you to track who the leaders are in your community. You may need to work with them in the future on a project, so it is good to know who they are and what power/influence they have in the community. Talk with city planners and other professionals to see what plans are currently in the works. There may already be plans for a project similar to yours, which your organization could get involved with or lead.2
<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Contact Information</th>
<th>Board or Committees</th>
<th>Preferred Contact</th>
<th>Pet Project or Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bruce Cats</td>
<td>Mayor</td>
<td>555 Main Street Smart City, MI 48888 555-3333(t) <a href="mailto:mayorbruce@smrtity.org">mayorbruce@smrtity.org</a></td>
<td>City Council, Regional Planning Commission, Rotary</td>
<td>Emails for short notes; in person for lengthy conversation</td>
<td>Smart Growth, affordable housing</td>
</tr>
</tbody>
</table>
## When Do Meetings Take Place?²

<table>
<thead>
<tr>
<th>Committee or Board (City)</th>
<th>Meeting Frequency</th>
<th>Time</th>
<th>Public Comment Period</th>
<th>Relevant Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Board</td>
<td>3rd Monday of each month</td>
<td>4pm</td>
<td>Yes, varies</td>
<td>Request agenda packet from Luann prior to meetings; talk to Mike about content of agenda &amp; best practices.</td>
</tr>
</tbody>
</table>
# Informal Leaders

<table>
<thead>
<tr>
<th>Name</th>
<th>Contact Information</th>
<th>Boards or Committees</th>
<th>Pet Project or Focus</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Eva Luna   | 1133 S. Main St. Happyville, MI 48887  
553-4545 (t)  
evarocks@scream.net | One Less Car Coalition; 
Council for Women; School Board | Fewer widenings of roads, more sidewalks and bike lanes | Good organizer and public speaker         |
**Identifying organizational readiness:**

**Initiative, Program, or Intervention Readiness Assessment Tool:** Even if the community is ready for your intervention, you might not be prepared to carry it out as an organization. Use the attached tool to determine if your organization is ready to implement the program you have in mind. The tool will reveal weaknesses for implementation and act as a guide for where your organization should focus efforts preparing for successful project implementation.

**How to Build a Caring Community Network (AARP):**

The attached guide takes you through the basic steps of establishing a community support network: including learning the community’s wants and needs, assigning team leaders, engaging members and the community, offering help, and inspiring others. The guide comes with a sample survey and calendaring options.

**References:**


The purpose of this tool is to determine organizational readiness for the implementation of an initiative, program, or intervention.

**Instructions**

*Please provide an accurate response based on your knowledge about your agency. Please answer all the questions to the best of your ability, even if you are uncertain of the answer.*

**A. Definitional Tools:** Describes the problem/concern that the county is trying to solve and the expectations for solving it.

1. Is there clearly written background information that defines the problem/concern to be addressed?

   - [ ] Not yet
   - [ ] Starting to
   - [ ] Somewhat
   - [ ] Just about
   - [ ] Complete

2. Are there interventions that are meant to address the problem/concern?

   - [ ] Not yet
   - [ ] Starting to
   - [ ] Somewhat
   - [ ] Just about
   - [ ] Complete

3. Regarding interventions to address the problem, are there elements of the intervention that are standardized?

   - [ ] Not yet
   - [ ] Starting to
   - [ ] Somewhat
   - [ ] Just about
   - [ ] Complete

4. Regarding interventions to address the problem, are there elements of the intervention that are variable based on circumstances and jurisdictional differences?

   - [ ] Not yet
   - [ ] Starting to
   - [ ] Somewhat
   - [ ] Just about
   - [ ] Complete

5. Have the benefits of the intervention for children and families been clearly stated and documented?

   - [ ] Not yet
   - [ ] Starting to
   - [ ] Somewhat
   - [ ] Just about
   - [ ] Complete
6. Is the intervention based upon theory or does it have a clear theoretical framework?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

7. Has a logic model been developed for the implementation of the intervention?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

8. Does the logic model define the inputs, outputs and desired outcomes that can be used as the foundation for an evaluation?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

9. Notes: __________________________________________________________

10. Recommended next steps: __________________________________________

   A. ______________________________________________________________
   B. ______________________________________________________________
   C. ______________________________________________________________

B. Engagement and Communication Tools: Materials that counties use to engage stakeholders and to communicate the county’s message about the intervention.

11. Are there materials that define the role and responsibilities of leadership?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

12. Are there “talking points” to guide leaders in engaging their staff in the intervention implementation efforts?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

13. Are there “talking points” to guide leaders in coordinating partners in the intervention implementation efforts?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

14. Are there fact sheets that can be provided to staff to explain the logic model and the intervention implementation process?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete
15. Are there fact sheets that can be provided to partners to explain the logic model and the intervention implementation process?

<table>
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</table>

16. Are there template letters for counties and courts to use to invite people to participate in the implementation process?

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17. Are there PowerPoint presentations (with notes) that present basic information about planned implementation activities for the following?

   a. Leadership

<table>
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<tr>
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<th>Starting to</th>
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</table>

   b. Staff

<table>
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<tr>
<th></th>
<th>Not yet</th>
<th>Starting to</th>
<th>Somewhat</th>
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<th>Complete</th>
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</table>

   c. Coordinating partners

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<tr>
<th></th>
<th>Not yet</th>
<th>Starting to</th>
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<th>Just about</th>
<th>Complete</th>
</tr>
</thead>
</table>

18. Notes: ________________________________________________________________

19. Recommended next steps: _______________________________________________

   A. __________________________________________________________
   B. __________________________________________________________
   C. __________________________________________________________

---

C. **Assessment Tools:** Allow counties to systematically assess their organizational readiness to implement an intervention by gathering baseline information.

20. Is an organizational assessment tool available?

<table>
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<th>Starting to</th>
<th>Somewhat</th>
<th>Just about</th>
<th>Complete</th>
</tr>
</thead>
</table>

21. Have staff completed the organizational assessment tool?

<table>
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<tr>
<th></th>
<th>Not yet</th>
<th>Starting to</th>
<th>Somewhat</th>
<th>Just about</th>
<th>Complete</th>
</tr>
</thead>
</table>

3
22. Has a process (e.g., focus groups, surveys, case reviews) been developed to gather additional information?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

23. Notes: ________________________________________________________________

24. Recommended next steps: ______________________________________________

   A. _________________________________________________________________
   B. _________________________________________________________________
   C. _________________________________________________________________

25. Is there a plan for how staff and other stakeholders will be identified and selected to participate in implementation?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

26. Has an action plan has been developed that includes staff roles, responsibilities and timelines?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

27. Are checklists and meeting agendas available?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

28. Notes: ________________________________________________________________

29. Recommended next steps: ______________________________________________

   A. _________________________________________________________________
   B. _________________________________________________________________
   C. _________________________________________________________________

D. **Planning Tools:** Describe what the county implementation plan is, how it was developed and roles related to implementation. These tools will be initiative-specific and will include timelines, checklists, and sample meeting agendas.

E. **Training, Coaching, and Transfer of Learning Tools:** Training curricula will be developed for the partners involved in the initiative and tools will be developed to help transfer what was learned in training to every day practice.
30. Please provide a response to each of the boxes in the matrix below.

<table>
<thead>
<tr>
<th>Stakeholder/Group</th>
<th>Have Key Knowledge, Skills and Values been identified?</th>
<th>Has a written Curriculum been developed?</th>
<th>Have Coaching Tools been developed?</th>
<th>Have Transfer of Learning Tools been developed?</th>
<th>Does the training need to be standardized?</th>
<th>Does training need to be mandated?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Yes ☐ No</td>
<td>☐ Yes ☐ No</td>
</tr>
<tr>
<td>Supervisors</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Yes ☐ No</td>
<td>☐ Yes ☐ No</td>
</tr>
<tr>
<td>Staff</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Yes ☐ No</td>
<td>☐ Yes ☐ No</td>
</tr>
<tr>
<td>Other Agencies</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Yes ☐ No</td>
<td>☐ Yes ☐ No</td>
</tr>
<tr>
<td>Stakeholders</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Yes ☐ No</td>
<td>☐ Yes ☐ No</td>
</tr>
<tr>
<td>Other identified participants</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Not yet ☐ Starting to ☐ Somewhat ☐ Just about ☐ Complete</td>
<td>☐ Yes ☐ No</td>
<td>☐ Yes ☐ No</td>
</tr>
</tbody>
</table>

31. What additional specific training, coaching and/or transfer of learning tools are needed to implement this intervention?  

32. Notes:  

Initiative, Program, and Intervention Readiness Assessment Tool | 2010
33. Recommended next steps: __________________________________________________________
   
   A. ____________________________________________________________________________
   B. ____________________________________________________________________________
   C. ____________________________________________________________________________

F. **Evaluation Tools:** These are standardized instruments that can be used to assess what works and what doesn’t work. The instruments may include county identified outcomes, ways to collect baseline data, and methods for administering and analyzing the data.

34. Have logic model outcomes been identified?
   
   - [ ] Not yet
   - [ ] Starting to
   - [ ] Somewhat
   - [ ] Just about
   - [ ] Complete

35. Have implementation outcomes been identified?
   
   - [ ] Not yet
   - [ ] Starting to
   - [ ] Somewhat
   - [ ] Just about
   - [ ] Complete

36. Have evaluation tools that will analyze the information to be collected been developed?
   
   - [ ] Not yet
   - [ ] Starting to
   - [ ] Somewhat
   - [ ] Just about
   - [ ] Complete

37. Has a process been developed that describes the integration of the evaluation process and the logic model?
   
   - [ ] Not yet
   - [ ] Starting to
   - [ ] Somewhat
   - [ ] Just about
   - [ ] Complete

38. Notes: __________________________________________________________________________

39. Recommended next steps: __________________________________________________________
   
   A. ____________________________________________________________________________
   B. ____________________________________________________________________________
   C. ____________________________________________________________________________

G. **Policy and Procedures Tools:** Describe the necessary policies and procedures that need to be in place to reflect successful implementation of the initiative.

40. Have all relevant All County Letters and Notices, County Policies and Procedures and Memorandum of Understanding been considered?
   
   - [ ] Not yet
   - [ ] Starting to
   - [ ] Somewhat
   - [ ] Just about
   - [ ] Complete
41. Have gaps in policies and procedures been identified?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

42. If necessary, have new policies and procedures to address implementation been identified?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

43. Notes:

44. Recommended next steps: ______________________________________________

   A. ________________________________

   B. ________________________________

   C. ________________________________

H. Fiscal/Funding Tools: Provide guidance and information on fiscal strategies and sources of funding?

45. Has a fiscal analysis been completed?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

46. Have fiscal funding streams for implementation been identified?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

47. Has funding been secured to implement the intervention?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

48. Has funding been secured to maintain and sustain the intervention?

☐ Not yet  ☐ Starting to  ☐ Somewhat  ☐ Just about  ☐ Complete

49. Notes: ______________________________________________________________

50. Recommended next steps: ______________________________________________

   A. ____________________________________________

   B. ____________________________________________

   C. ____________________________________________
Young or old, most people need a little help now and then. An organized caring community network can provide the support needed to help people through a rough spot, or help them remain in their homes.

INCLUDED IN THIS TOOLKIT:
1 Overview
3 The Basic Steps
8 Online Calendars & Caring Support
9 Sample Survey - Overview
10 Sample Survey, page 1
11 Sample Survey, page 2
12 Sample Survey, page 3
13 Sample Survey, page 4
14 Sample Survey, page 5
15 Additional Resources
OVERVIEW

People of all ages need a little help now and then. When you are part of an organized caring community network, your group can provide the support needed to help people through a rough spot, or help them remain in their homes.

The Problem

At some point in our lives, many of us might face difficult circumstances – from aging-related challenges to major life events like having a baby, battling illness, caring for a frail family member, or recovering from loss. Often these events mean we need help with small tasks such as preparing meals or running errands, or we may need more support for particularly challenging situations. Sometimes people lack sufficient family support in times of need. Meanwhile, others would be happy to lend a hand – but may not know help is needed, nor how to help.

The Solution

A neighborhood support network can help in numerous ways, including organizing people to provide meals when needed, helping one another shovel snow, sharing offers to drive someone to church or the grocery store, arranging walks for a neighbor’s dog, even identifying a good handyman who will offer discounts in the neighborhood. It also might involve more connections among trusted neighbors, including those who are frail, supplementing the support they receive from family. When friends and family help each other together, everyone feels good.

Time Commitment

Several hours a week for a few months to form caring community teams and get things started. After that, you’ll need a few hours per month (or more as you choose) to help neighbors and organize occasional community get-togethers.

Special Considerations

Once you get this project rolling you will need to stay committed and be prepared to ramp up activity on short notice. For example, a neighbor might go in for emergency surgery and suddenly need to rely on your caring community for help.

Who can do this?

Everyone.

Great Reasons to do this Project

- Help neighbors who could use a little support.
- Strengthen neighborhood and community bonds.
- Build a network that will be there for you when you need it.
- Coordinate services or activities together; you may be able to get group discounts.

Visit CreateTheGood.org for more opportunities, tools and ideas to help improve your community.
• Have fun engaging with others in your community.
THE BASIC STEPS

STEP 1: LEARN YOUR COMMUNITY’S WANTS AND SKILLS

A survey is a great way to identify what members of your community need and how they’d like to help. See the sample survey in this guide. This survey was developed by members of Prairie Crossing Volunteer Corps, in Prairie Crossing, Grayslake, Ill., to capture specifics after an initial community discussion.

To begin such a conversation in your community, you might start with a neighborhood gathering like a potluck dinner/picnic, block party or other fun get-together. Let people pitch in by bringing an item and inviting nearby neighbors to attend, as this strengthens community bonds. After that, you might ask whether people would like to meet and discuss developing caring community teams. Such a discussion can help inform a survey. Use the attached survey example as a guide – feel free to shorten or edit it based on what you feel fits, and what’s doable in your community.

STEP 2: ASSIGN TEAM LEADERS

Use your survey results to determine the sort of caring community your neighborhood wants to build. Ideally, many community members will express desires and also offer to help. For example, you might have one neighbor who is so busy with caregiving that he doesn’t have time to run out for groceries or mow his lawn. Based on survey results, identify the main things people want and decide on a few teams to cover those things. Organize those who want to help into those teams, based on what people say they want to do. If you have nurses, carpenters or aspiring chefs among your group, some team assignments may easily fall into place. Identify someone who can lead each team. Examples of tasks that can be assigned to teams include:

- Driving
- Handyman services
- Food prep and drop off
- Personal connection and support
- Navigating health and community resources
- Pet care
- Yard care

Visit CreateTheGood.org for more opportunities, tools and ideas to help improve your community.
• Social events

Based on survey results, you might also reach out to local businesses or community colleges to seek ideas about addressing certain identified needs (e.g., discounts on home repairs, shared exercise classes, discussion groups, how-to classes).

STEP 3: ENGAGE YOUR TEAM MEMBERS AND THE BROADER COMMUNITY

Your next step is to invite your teams to get to know one another better and start building stronger connections across the community. This will set up your teams to know when help is needed; collaborate well when a need arises; and offer help in a way that’s most comfortable to the person in need. Once you’ve identified teams, hold a get-together to discuss how the teams might implement some easy ideas from survey results.

Your survey might offer ideas about what people want, such as discounts on coordinated home heating/air conditioning service, or maybe a walking club or book group. Or you might invite people to help plan and contribute food/games for a community-wide get-together (neighborhood barbeque, July 4th parade and games, sand-castle/snow sculpture contests, etc.). Whatever you do will help people know one another better.

You’ll need a way to communicate with the community about these activities. If there’s a community newsletter (e.g., a list serve or monthly flyers) you might use that. If that’s not available, figure out an easy way to share information across the community.

Ask whether there’s someone in the neighborhood who would agree to manage an online group or post flyers at key corners, elevators, or a local community location. You might also consider developing a local phone list, including information about special skills.

Your team members might also think about ways to stay connected to specific people in the neighborhood. Some might already know lots of people and offer to stay in touch with them. Others might suggest there are a couple of people on their block they’d like to get to know better. Again, go with what people think will work.

STEP 4: OFFER TO HELP

As you build connections across the community, you may find that no one needs special help initially. That’s fine. You might start with a project that benefits a larger group of neighbors (e.g., helping one another prepare for emergencies), or a nearby cause (e.g., reading to youth.) Check out www.CreateTheGood.org/how-to-guides for a host of ideas. You also might find that some teams are busy initially, while others are not – so you might need to cross-pollinate. Sometimes an event – like a lengthy power outage – can create a more pressing need for outreach and service among community members and can be a catalyst for recruitment.

Invite your neighbors to join various projects, and also tell them whom to contact if they need a hand. As

Visit CreateTheGood.org for more opportunities, tools and ideas to help improve your community.
many people are more comfortable with those they know and trust, it’s also helpful for individual team members to put the word out to neighbors they know best. And, when your team does learn of someone who might need assistance, the person they know best should offer and arrange help – if they’re interested.

Examples of people who might need help include:

- Someone with reduced mobility due to an injury
- A neighbor caring for a frail loved one
- Someone who recently had major surgery
- An individual who might appreciate a regular stop-by from a trusted neighbor
- Parents who recently had a baby
- Someone who needs a hand with minor repairs or moving something heavy
- A neighbor who recently lost his/her spouse

It is crucial that the person or family you are helping fully understands what to expect. Again, working through someone very close to the recipient, make sure it’s clear what tasks your teams are offering to do, how often they’ll be around, the age range of the volunteers and, for special projects, what expertise they have. Someone may want some of what you’re offering but decline other services. Always respect those desires and requests.

You’ll also want to establish a clear and consistent way that recipients can identify volunteers. Some caring communities use t-shirts with a simple logo or badges. Such a system gives added comfort to the recipient and reduces the chance that someone unaffiliated with your community could slip into a recipient’s home undetected.

**STEP 5: START HELPING**

If the need you’ve identified is easily met with your established teams, that’s great. If the need exceeds the capacity of your teams, ask additional neighbors, friends, family and other community members to help. Often, people rise to the occasion for a special need. Be sure to make all those requests in a way that’s comfortable to the person you’re helping.

If your volunteers see a need that is outside the scope of your teams – for example, your group may not be able to provide round-the-clock care – make sure they know to tell you about it. That way you can discuss additional options with the person being helped – e.g., local service agencies, help from family, etc.

If you need additional help within the scope of what you can do, consider personally approaching people to ask. If the need requires extensive scheduling, you might find it easier to use an online calendar, so community members can schedule things such as rides, meals or errands. See more information about

Visit [CreateTheGood.org](http://CreateTheGood.org) for more opportunities, tools and ideas to help improve your community.
online calendars in the Tip Sheet in this guide.

As you and your teams work to help someone through a tough time, it is important to remain sensitive to the person you are helping. Most of us are particular about how we run our households and, while people likely will appreciate what you are doing, make sure your teams are respectful and always honor the individual’s privacy. Establish a clear expectation that people are not to repeat what others tell you, nor share anything that’s heard or observed while helping out.

Also be sure to reflect people’s preferences in the way you offer help. For example, someone recovering from illness might be too tired to socialize, or a new mother might not want anyone to wake the baby, so you could put a cooler on the porch in which to leave meals. Or, a family caregiver might have complicated needs and responsibilities, so you might have to go with the flow.

At the same time, the person you are helping should feel comfortable asking for specific things. Be sure to reiterate that your teams are there to do whatever the person needs (within reason, of course).

**STEP 6: BUILD ON WHAT YOU’VE STARTED**

Once you’ve started helping others in your community, discuss amongst your teams what’s working and what you might like to do differently. Reach out to the person or people you’ve helped and ask for their honest feedback. Stay alert to the capacity of your team to help – keeping expectations in line with people’s abilities and time. Discuss how you might improve or adjust your caring community approach.

Continue to be alert to neighbors who could use a hand. By now, everyone in the network should be aware of what you’re doing and alert to opportunities to help. Be sure people know who’s on each team, so they know whom to ask.

Remember, even small projects – like repairing a railing on a porch, or sharing dinner once a week with a neighbor who lives alone – can mean a lot to the person who benefits, so don’t think you have to mobilize your entire network for every situation. The important thing is to nurture the sort of caring community your neighborhood envisions and can support.

**STEP 7: INSPIRE OTHERS ON CREATETHEGOOD.ORG!**

**TELL US WHAT YOU DID!**

We want to hear stories (www.CreatetheGood.org/stories) about how you helped give back to your community. You just might inspire others to do the same.

**KEEP UP THE GOOD!**

Visit CreateTheGood.org for more opportunities, tools and ideas to help improve your community.
Remember, whether you’ve got five minutes, five hours or five days, you can make a positive impact in your community. And if you have more time, consider organizing another service activity, finding local opportunities and posting your events at www.CreateTheGood.org.
ONLINE CALENDARS & CARING SUPPORT

Depending on your situation, one of the three sites listed below may help you to arrange caring support. If you choose to use one of these tools, you’ll need an email address and password for access, and will then follow a series of questions and prompts to customize your site.

CaringBridge - [www.caringbridge.org](http://www.caringbridge.org)
This free, customizable site helps connect family and friends during a serious health event. It’s a good tool for keeping friends and family informed about a person’s condition and for visitors to leave messages of love and support. Users can sign up to be notified when the journal is updated with new information. You can also have your customized website turned into a CaringBook, a professionally printed book.

Lotsa Helping Hands - [www.lotsahelpinghands.com](http://www.lotsahelpinghands.com)
You can use this website to create a free, private, web-based community to organize family, friends, neighbors, and colleagues – a family’s “circles of community” – during times of need. Easily coordinate activities and invite and manage volunteers with an intuitive group calendar. Communicate and share information using announcements, message boards, and photos.

CareFlash - [www.careflash.org](http://www.careflash.org)
Share caregiver experiences with others who are seeking knowledge, resources, and insights into providing the best possible care for their senior loved ones. Once you register, you can set up a private, personalized Care Community to help organize a care team, assign roles to each care team member, share photos, post supportive messages, maintain a care calendar, report on scheduled events, chart recurring health readings, and more.

Visit [CreateTheGood.org](http://CreateTheGood.org) for more opportunities, tools and ideas to help improve your community.
SAMPLE SURVEY - OVERVIEW

SAMPLE Survey For Developing A Caring Community Network

Originally developed by Prairie Crossing Volunteer Corps, Grayslake, Illinois

Note: This survey worked for one particular community. We offer it as a sample for you to consider as you develop a survey that fits your community.

A group of volunteers has organized a task force to examine ways to create an environment in our community that will permit us, our friends and neighbors to choose to remain in our homes as we age or need extra assistance due to injury, illness or physical condition. This survey is designed to collect information about the likely need for services in our community in the near future. For now, the questions address services in three areas: home maintenance and repair; health and wellness; and daily living and convenience services.

We are hoping you will respond to this survey. In the first part, please indicate whether you feel that you would benefit from particular services now, and if not now, five years into the future. The second part of the survey includes a few more open-ended questions that will help us better understand what people in our community are thinking on these issues. Survey responses may be confidential if you wish, but if you are willing to include your name and contact information it will permit follow-up questions and discussion. To the extent survey results or comments are published, that will be done without identifying information, unless your permission is obtained.

Name (optional)

________________________________________________________________________

Address (optional)

________________________________________________________________________

Telephone number (optional)

________________________________________________________________________

E-mail address (optional)

________________________________________________________________________

Please return your survey in the enclosed pre-addressed envelope. Feel free to include notes, and use the back of pages or extra sheets of paper if you would like.
## SAMPLE SURVEY, PAGE 1

Home Repair & Maintenance Services

1. Would you be interested in having the following services automatically and reliably provided?

<table>
<thead>
<tr>
<th>Service</th>
<th>Now</th>
<th>In 5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Min. twice annual inspection and report on repair needs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summer A/C inspection, winter furnace inspection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plumbing, water heaters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sump pump system</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report &amp; recommendations for how to get the needed work done</td>
<td></td>
<td></td>
</tr>
<tr>
<td>General handyman services such as light &amp; battery replacements,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>stuck windows/doors, opening/closing problems, blown fuses &amp; outlets,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>minor carpentry repairs, things you don’t know how to do</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:

2. Would you like to have recommendations you consider reliable, on repair needs and providers, regarding:

<table>
<thead>
<tr>
<th>Service</th>
<th>Now</th>
<th>In 5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roof repairs &amp; replacement; including gutters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exterior repair, sealing, painting windows, doors, trim, porch, steps</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Walkway, driveway maintenance, incl. snow removal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Landscape maintenance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interior renovations, incl. painting, floor replacement, projects</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Major electrical work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Furnace, water heater, other equipment replacements &amp; repairs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:
### Build A Caring Community Network

**SAMPLE SURVEY, PAGE 2**

Daily Living/Convenience Services, Health & Wellness Services

#### 3. Are you interested in the following daily living and convenience services?

<table>
<thead>
<tr>
<th>Service</th>
<th>Now</th>
<th>In 5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meal preparation or meal service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation at your convenience (local)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping, groceries, library books, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laundry, dry cleaning, other services with time intervals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular house cleaning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:_________________________________________________________________

#### 4. Health & wellness: Are you interested in the following services?

<table>
<thead>
<tr>
<th>Service</th>
<th>Now</th>
<th>In 5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>First response/on call to determine a course of action for health events</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trustworthy home health care/social worker: regular attention to regular needs; administer medications; bathing; supervise diet; etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical &amp; occupational therapy (at home)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical/dental/specialist referrals Help with selection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical equipment: procurement for &amp; return after temporary use</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completion of health insurance claim &amp; other forms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:_________________________________________________________________

Visit [CreateTheGood.org](http://CreateTheGood.org) for more opportunities, tools and ideas to help improve your community.
SAMPLE SURVEY, PAGE 3

Social, Educational & Physical Activities

5. Social & educational activities: in which of these services are you interested?

<table>
<thead>
<tr>
<th>Service</th>
<th>Now</th>
<th>In 5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>General get-togethers, coffee, tea, breakfast club, potluck, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hobbies and crafts, done in groups</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group games: bridge, chess, scrabble, various other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group music, playing instruments, singing, listening</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nature outings, bird watching, seed collecting, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Study &amp; discussion groups: books, history, philosophy, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seminars, workshops, presentations set up by/for the group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How-to classes, computer, internet, specialty cooking, exercise, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entertainment trips, theater, concerts, movies, excursions, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteering for various causes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Other:

Notes:

6. Organized physical activities: Are you interested in the following services?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Now</th>
<th>In 5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled and tailored group exercise programs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Walking groups (indoors and outdoors)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiking, biking, x-country skiing (with supervision &amp; help, if needed)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Swimming &amp; water exercise groups</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dancing classes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:
7. When you consider remaining in your home at a point in time where you will require assistance, what issues and concerns are foremost in your mind?

8. Are there services, not included in those listed in this survey that you would like to see provided? If so, what are they?

9. Would you be willing to participate in a follow-up survey, interview or discussion about these issues, concerns and needed services?
   Yes______  No______
Demographics

Demographic Information

1. The size of your household now is: 1 _____ 2 _____ 3 _____ 4 or more _____

2. Do you anticipate that changing within three years? _____ If Yes, to how many people? _____

3. (Please respond with numbers for as many as apply to your household.) Is your age within the range of:
   under 55 _____ 55 - 64 _____ 65 - 74 _____ 75 - 84 _____ 85+ _____

4. How long do you hope to live in this community or nearby?
   For the rest of my life _____ 1 - 4 years _____ 5 - 10 years _____ Over 10 years _____

5. Do you use email? _____ Do you use the Internet? _____

Notes:

Thank you for completing this survey. The summary of responses will greatly assist our future discussions of what is important to the community. If you would like to contact the (name of neighborhood group) about its purpose, feel free to phone (name) at (#) or email (name) at (email address)

(Date survey is sent)

Special thanks to Prairie Crossing Volunteer Corps, of Prairie Crossing, Grayslake, Ill., for developing this survey example.
ADDITIONAL RESOURCES

AARP Caregivers Resource Center - www.aarp.org/caregivers

AARP Online community group discussions - www.aarp.org/online_community/groups/

Eldercare Locator - www.eldercare.gov

Project Compassion - www.project-compassion.org/index.php

National Alliance for Caregiving - www.caregiving.org

Faith in Action - www.fianationalnetwork.org

National Family Caregivers Association - www.nfcacares.org

National Respite Locator Service - www.respitelocator.org

The Transition Network Caring Collaborative - www.ttncaringcollaborative.org

AARP Online how-to kits on home safety, medication management and more - www.CreateTheGood.org/how-to-guides

Special thanks to: Prairie Crossing Volunteer Corps, of Prairie Crossing, Grayslake, Ill., for contributing to this toolkit.

Visit CreateTheGood.org for more opportunities, tools and ideas to help improve your community.
Chapter 5: Starting projects and programs

Starting coalitions:

Starting a new project or program is extremely exciting. There are many ways to go about tackling this. You could begin by starting a coalition, which is often considered critical for a successful project.

What is a coalition?

"A coalition is a group of individuals or an organization with a common interest who agree to work together toward a common goal. That goal could be as narrow as obtaining funding for a specific intervention, or as broad as trying to permanently improve the overall quality of life for most people in the community."\(^1\)

Who should be a part of the coalition?

Depending on the scope of the project, a coalition may include a select number of community members or representatives from all aspects of the community. Decide who will give you the valuable input and skill set you require for the project. You will have the opportunity to involve the rest of the organization or even whole community later on.\(^1\)

Building Coalitions (identifying members):

1. **Organize a core group.** This should consist of individuals or organizations who are also concerned about your issue of interest.
   
   - Go through the contacts you have collected as an organization and pull out those who might be interested in your project. If organization members have relevant contacts, they can share those as well.\(^1\)

   - For your issue of interest, identify those in the community currently most affected by the problem. Once you have distinguished this group begin contacting them. Leaders of these groups can provide useful insight and information on how to tackle the problem. They have a unique viewpoint and connection to your target group.\(^1\)
• Influential community leaders can help your efforts by recommending people for the coalition.¹

2. Identify key coalition members

• Key members are those that the coalition must have on board. These people provide critical insight to the target group and have connections. You must reach out to these people at the start of your project. This group of people might include someone from the target group or a local official crucial to the project’s momentum.¹

Building Coalitions (recruiting members):

After you have a solid foundation of coalition members, you may begin recruiting other community members. You will want to be as inclusive as possible. The initial core group that you recruit can also contribute suggestions on who they think should join the coalition from the general community or other organizations.¹

While recruiting future coalition members, you can have a written description of the project or coalition’s mission prepared to give them. Although you could hold a general large group meeting for everyone planning to join the coalition, it might be better to have smaller group meetings with specific topics to cover instead. Large group meetings must be scheduled far enough in the future where everyone you want to attend will have a clear calendar. Working with smaller groups (and smaller schedules) will allow meetings to happen sooner and work to begin quickly.¹ People value their time and want to know their knowledge will be used for a specific purpose in the near future.

Your coalition’s first meeting should be one of high-energy with an optimistic aura to get people excited. It should be used to introduce everybody, define what the coalition is for, explain the vision, and discuss how you will move forward. Always follow up after meetings. Assign someone to coordinate future meetings, send out minutes, remind people of meetings and agendas, and keep everyone on track.¹

General coalition goals can include:

• Creation or altering of public policy, normally regarding a specific issue

• Changing the behavior of individual community members (smoking cessation, increasing fruit and vegetable consumption)
• Working to build a healthier community (including physical, social, and psychological health)²

Community participation:

Working with the community:

"If community members are involved in planning their own healthy community and implementing specific projects, not only is it more likely to be built, but they will be much more likely to come."² Community member participation can also be useful in getting policy makers on board with your issue. Government leaders need to understand the existing problem and how a policy change can positively affect it. This process can be quite challenging however, with ample community support to show change is in the best interest of the community, they are much more likely to listen.²

Models for successful community participation:

While working with community members, neighborhood associations, and other community-based organizations keep the following three points in mind.

1. Contact people and organizations you will want to work with as soon as possible. Get ahead of the problem you are trying to tackle by explaining why change is necessary to better the overall health of the community.²
2. Be prepared with key message points and a realistic plan to be put in place utilizing community resources.²

3. Keep your eyes peeled for new opportunities to help your community. Be a resource outlet for neighborhoods when an issue arises. Figure out how to best handle the situation, involving the existing neighborhood leadership when possible.²

**VMOSA (vision, mission, objectives, strategies, action planning):**

VMOSA was previously described in the "groundwork" section of this binder for creating a solid organization foundation. It can also be used when planning projects and programs. While going through the VMOSA process, involve community members who will be affected by the change or program you are trying to implement and those who can help. This ensures the work you do will have the greatest impact and address real needs. Going through the VMOSA process for new projects allows an organization to lay out a vision and mission to guide them as well as end goals it will work toward. It helps you decide what first steps should be taken.³

**References:**


Chapter 6: Finding a project leader

Learning how to be a community leader:

What is a community leader?

A community leader is someone who takes charge and responsibility of community change and well-being. They are people who want to improve their community, contribute talents and skills they possess, and do not wait for others to fix a problem. Ask yourself if you are one of those people. Can you think of anyone in your organization who fits that profile? Everyone possesses some leadership qualities just waiting to be used. As a community leader, you can take on as much or as little responsibility as you want. You will learn by trial and error, gaining something new from every experience.¹

Why should you be a community leader?

There are several reasons to become a community leader. Three good ones are: to make a difference, to grow personally, and because they are needed.

1. To make a difference - As a leader you have the power to effect real change within your community. Some examples of this include: reducing neighborhood blight, starting a local farmers market, adding city bicycle lanes, or empowering others to lead.¹

2. To grow - You will grow as a person and become more confident in yourself. Leading a group of people provides a whole new set of experiences. Handling communications, negotiations, and social situations will all be a part of your leadership role. This is an opportunity to improve public speaking skills as well. Begin with a small leadership role and slowly take on more responsibility.¹

3. Community leaders are needed - Communities are unique in that they do best with many community leaders. One or two leaders is rarely enough to solve the problems present in a community. Multiple leaders can work on a smaller scale and accomplish much more. "The more people become leaders, the more problems we will solve. We need community leaders to think about and organize around many issues: youth development, economic growth, substance abuse, crime, the environment, health care, etc."¹ People of all ethnicities, races, gender, age, etc. can and need to be leaders. Everyone can bring something to the table.
Be sure to lead in ways that make you and others feel happy and satisfied. Choose to run something you feel excited about and is of interest to you. Whatever you chose to lead, whether it is a meeting or an entire project, you will improve your skills.

When should you lead?

Always. Even if you are not the "designated leader" you can always lead. While attending organization meetings you can be thinking of ways to move the project forward. It is good to think like a leader all the time. You can always contribute ideas to the group and offer a fresh perspective/opinion. Official leaders often need help and will appreciate contributions. When the group leader is feeling discouraged, you can rally the group together to work on projects based on what the leader needs done.¹

How do people learn how to lead?

You do not have to be great at leading right off the bat, but will learn over time. Ways to practice your skills include jumping in and practicing, observing others lead, finding a mentor, taking a class or workshop, and reading books about leaders and leadership.¹

Community leaders do the following:

1. **Dream big to create their personal vision** (dream big for yourself and for your goal, consider interviewing a young person, thinking like a teenager, and don’t let practical considerations and budgets hamper your brainstorming). Create your own vision statement, putting your dreams into words, communicates a visual picture of what you are trying to do. The vision statement will help guide you and your work.
It will keep everything on track and act as a reminder of what you set out to do. Keep your eye on the prize.¹

2. *Listen to people.* Get their thoughts and input. Organizations and community members will become more engaged in your efforts when they feel valued.¹

3. *Decide to take responsibility for their community.* You must view yourself as a leader. You bring unique qualities and talents to the table which no one else can contribute.¹

4. *Set Goals.* Once you have your vision, create both long and short term goals. An example of a long term goal is to create more city bike lanes. Alternatively a short term goal would be to identify where bike lanes are most needed, or how many people currently bike on a particular road.¹

5. *Think about the individuals in the group.* Think about how each individual is affecting the group. There may be talented people whose expertise isn’t being used. There may be others who are being disruptive or need help working as part of the group. You can reach out to these individuals.¹

6. *Think about the group as a whole.* Although each individual in the group is unique, as a group everyone should share a collective vision for the work being done. Members need to trust and support one another. You may need to provide some training for the group, depending on the project requirements.¹

7. *Propose programs and policies.* Make proposals to the group and listen to what the group thinks of them and anything they have to add. Make changes based on the suggestions. This is a good way to move the group forward.¹

8. *Get the work done.* It is up to the leader to make sure the job gets done correctly and on time. You must recruit others to help, as you cannot do it all. You will have to pick up the slack from time to time, meaning printing out labels, cleaning up the kitchen, making those extra phone calls, staying up late, or getting up very early.¹

9. *Recruit and teach others to become leaders.* One of the main jobs of a community leader is to teach others in the group and create more community leaders. This way after you have left the project or organization, there will be someone to continue it. Take time to recruit, train, mentor, encourage, and support others. Some steps to take include: finding people with leadership potential, helping people view themselves as leaders, helping people identify reasons why they want to lead,
assisting people in choosing goals which are attainable and will build their confidence, supporting them while they reach goals, supporting them through mistakes, and challenging people to take the next step. Leaders develop over long periods of time, requiring mentoring from current leaders. Potential leaders should be given small roles in the organization to practice leading.1

What are some qualities of successful community leaders?

- Integrity
- Courage
- Commitment
- Ability to care about others
- Creativity
- Flexibility1

Getting and giving support as a leader:

As a leader you need support from your organization to get through the hard times, to have someone listen to your thoughts and ideas. It may be helpful to set aside time with another group member to discuss problems you are facing as a leader. Talking things out with another person can prove extremely helpful.1

Consider forming a leadership group, in which all organization leaders meet periodically to discuss what has been going well and what each individual's leadership role entails. Throughout these meetings you might ask questions such as, what have you accomplished in the last period, where do you have difficulties as leader, or what are your goals during the next period?1

A word on emotions:

Being a leader can be very stressful, leading to self-destructive habits. This is especially true if you are working a lot at another job. Leaders may end up taking unnecessary action, uncalled for action, or not take action when it is required. Your well-being is very important for the organization to function effectively. Talk out your problems and emotions with other members of the organization. Members should come to your side when things get tough, just as you do for them.1

Key take-away points:
Although some people are born with personality traits that may lead them toward leadership roles, anyone can lead with a little practice. Organizations are always in need of more leaders to head projects and programs. The best way to harness your skills, boost self-confidence, and be the best leader you can be, is by practicing and starting small.

Now that you have learned everything it takes to become a leader, turn to the next section to learn how to run a project.

**The Nuts and Bolts for Project Organizers (AARP):**

The attached guide provides steps for a project leader to go through when completing a community project. Steps include making a plan, building a team, thinking about collaboration, connecting the dots, completing the project, and inspiring others. A planning worksheet, recruitment message, press release, and tips for publicizing your project are also included.

**References:**


Too often, community projects lose steam or fall short of their goals due to a lack of organization. This toolkit will help you in the successful planning and delivery of your community project, no matter what the focus.

INCLUDED IN THIS TOOLKIT:
1  Overview
2  The Basic Steps
6  Planning Worksheet
7  Crafting a Successful Recruitment Message
8  Sample Recruitment Message
9  How to Gain Visibility for Your Project
10 Sample Press Release
11 Additional Resources

9-17-13
OVERVIEW

Too often, community projects lose steam or fall short of their goals due to a lack of organization. This toolkit will help you in the successful planning and delivery of your community project, no matter what the focus.

The Problem

If you’ve ever planned an event, you know that the devil is in the details. This toolkit is designed to help you organize volunteers to help you successfully complete your community project.

The Solution

Pulling together a team of volunteers – and knowing how to organize and motivate them – can help you run a successful community project.

Time Commitment

Varies by project, from a few hours to a couple of weeks.

Special Considerations

If you have an intact group to work with such as a club, a group of friends, etc., this may be a great place to start.

Who can do this?

Everyone! Helpful skills may include strong organizational skills and the ability to work well with others.

Great Reasons to do this Project

- Develop a sense of renewed energy and commitment to helping people in your community
- Connect with neighbors to promote a worthwhile community project
- Gain new insight and a fresh perspective of your community

In every community there is work to be done...in every heart there is the power to do it. –Marianne Williamson

Visit CreateTheGood.org for more opportunities, tools and ideas to help improve your community.
THE BASIC STEPS

Before reaching out to people, you should have a fairly firm idea of what you want them to do to help fulfill your community project. Remember: A key element to an effective community project is the planning.

STEP 1: MAKE A PLAN

Define your project goal and what you hope to achieve. Try to avoid assumptions, like “This is a great idea, so I know people will jump on board!” People usually need convincing before they commit their time and energy to something. You can improve your planning by including ways to overcome people’s skepticism of your project. Before reaching out to people, you should have a fairly firm idea of what you want them to do to help fulfill your community project. Remember: A key element to an effective community project is the planning.

Consider these questions:

- What is the focus and scope of your community project?
- Does the goal have strong group support?
- Will your project have an immediate visible impact in your community?
- How will you measure progress?

For tips on implementing your community project, see the Planning Worksheet.

STEP 2: BUILD A TEAM

Identify the type and the number of volunteers you will need. For example, for a river cleanup, you’ll want people who are passionate about the outdoors. For a public benefits assistance effort, you’ll want people who are patient, detail-oriented and work well with others.

Consider a co-leader for the project. You probably want someone who complements your skills. For example, if your strength is creativity, think about getting a co-leader who is highly organized. Start with your own contacts and networks. Clearly spell out what you expect from team members. Emphasize how much of an impact you can all have working together, and note that your project is intended to improve the community for everyone, not just a select few.

Visit CreateTheGood.org for more opportunities, tools and ideas to help improve your community.
Personally asking people to join your effort can go a long way, so start by contacting people you already know. Then you can expand the recruiting effort to the broader community. Bulletin boards, faith-based newsletters, homeowner’s associations, Neighborhood Watch groups and libraries are great examples of ways to reach numerous people with one message.

Build on informal networks you may already have in place to recruit individuals. You can even partner with a school, faith-based groups, community centers or other networks to spread the word. Always include a brief description of your project and desired outcomes so that potential volunteers are clear on your needs.

You can leverage technology by reaching out through www.CreateTheGood.org, neighborhood email lists, social media sites (like Facebook) and community blogs. If possible, include a phone number and an email address for people to use to get more information. See tip sheets at the end of this guide: Crafting a Successful Recruitment Message and Sample Recruitment Message.

STEP 3: THINK COLLABORATION

Depending on the size, scope and goals of your project, you might want to seek a collaboration or sponsorship – for example, with a corporation, nonprofit organization or local government. You might already be a member of a group that can collaborate with you.

Before you approach potential sponsors or collaborators, have a very clear idea of precisely how you’d want them to help. For example, you might ask a local company to encourage staff to participate in your project or let you use the company’s building on project day. If you’re organizing a cleanup, you could ask the mayor’s office to provide trucks and manpower to haul the trash away. If you’re planting a community garden, a local landscaping company might agree to help design, build and plant.

As a grassroots organizer, you probably won’t have anything of monetary value to offer in exchange, but remember that many organizations and companies want to be associated with local improvement efforts. Simply including their logo on your flyers and letting them mention their involvement in a press release is often sufficient.

STEP 4: CONNECT THE DOTS

It is crucial to have your entire team on the same page about the purpose, goals and scope of your project. A committed volunteer who is working without clear direction can quickly do far more harm than good for you! Meet with your team periodically – and/or use email blasts (if the members of the team have agreed to receive communications via email) – to ensure that the effort is progressing as planned, and make project leaders available to clear up any uncertainty among the team.

Occasional meetings can also help keep your team motivated. Remember, few people besides you will be thinking about your project every day, and some may lose interest if they feel their involvement isn’t
appreciated. Sending updates every week – even when you have little news to report – and inviting your team to meetings can help keep people energized.

**STEP 5: PROJECT DAY: MAKING IT HAPPEN**

Have a solid game plan for your main project day. Here are some items to include in your plan:

- Arrange for snacks and drinks for your volunteers.
- Ensure there is adequate legal parking for your team and attendees.
- Have a foul weather plan if your event is outdoors.
- Get a home or cell number for managers of any facilities you might use (like a community center) in case the building is locked or the air conditioning is out, etc.
- Have a checklist of all the supplies you need and the full day’s schedule, and keep it handy so that you’re not forgetting important details or overlooking items needed.
- Have a concise, consistent message for any reporters who might show up or call. If local officials or other VIPs plan to attend, make sure you or a co-leader are prepared to greet them, and give them an opportunity to address the group.

For tips on promoting your community project, see the tip sheets at the end of this guide: How to Gain Visibility for Your Project and Sample Press Release.

**STEP 6: CELEBRATE SUCCESS**

Congratulations! You did it. Take time to celebrate your success and thank your volunteers, partners, vendors and any VIPs who attended. Emphasize to everyone the positive impact they made on the community. Ask them to share any particularly inspiring stories from the day.

In the days immediately after the event, ask your team members for feedback while the experience is still fresh for them. Encourage them to be candid and share their ideas for how the project – from recruitment through completion – could be improved. Hopefully, you will want to lead other community betterment projects in the future and learning from this experience will help greatly in other efforts.

**STEP 7: INSPIRE OTHERS ON CREATETHEGOOD.ORG!**

**KEEP UP THE GOOD!**

Visit [www.CreateTheGood.org](http://www.CreateTheGood.org) for a range of opportunities to use your life experience, skills and passions...
to benefit your community.
PLANNING WORKSHEET

<table>
<thead>
<tr>
<th>Community Project</th>
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<tbody>
<tr>
<td>What is the purpose of your community project?</td>
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<th>Recruitment</th>
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<tr>
<td>What do you expect volunteers to do?</td>
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<tr>
<td>Why would someone volunteer for this community project?</td>
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<tr>
<th>Community Sponsorship and Collaboration</th>
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<tbody>
<tr>
<td>What do you want sponsors or collaborators to do?</td>
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<td>Who do you want to collaborate with?</td>
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CRAFTING A SUCCESSFUL RECRUITMENT MESSAGE

Whether it’s a written message to a local newspaper, a flyer in a library or a personal ask to a friend, you need a compelling recruitment message that explains why your community project is worthy of someone’s time. Keep your message simple and short and include the who, what, where and when of the project.

Remember to emphasize the good that people will do in their community by joining your project. If you have high-profile collaborators or sponsors, mention them in your recruitment message. That helps lend credibility to your effort and gives people a sense that they are joining something that already has some momentum.

Your message may also include a statement about being part of a group or a bigger effort, which can be very appealing. In addition to the necessary elements of a good recruitment piece, there are also key words and phrases that can be effective. Here are a few examples:

- Exciting opportunity...
- Give back to your community...
- A little bit of volunteering can make a world of difference in our lives.
- Meet neighbors, have fun, do good...
- The opportunity to make an important difference in your community...

Visit CreateTheGood.org for more opportunities, tools and ideas to help improve your community.
SAMPLE RECRUITMENT MESSAGE

An Exciting Opportunity for Gemima County Residents

We need your help on Saturday, April 10, for our 2nd Annual Repair Fair to install energy-efficient items, complete prevention checklists and make small repairs in three homes in the Tanner Heights community. We especially need volunteers with repair skills in plumbing or electricity. You can be a part of helping seniors in the Tanner Heights community live in safer, more comfortable homes.

Who: Gemima County residents

What: Second Annual Repair Fair

When: Friday, September 10, 2010, starting at 8:00 a.m.

Where: Gathering at City Park (light breakfast and lunch provided)

For more information, contact Jane Doe at 555-555-5555.

While finding volunteers through referrals and local contacts still works best, the use of an online recruitment database is another option for finding volunteers. Visit www.CreateTheGood.org to post your community project.

Finally, be sure to ask people to volunteer directly with a “personal ask.” Be mindful to provide them with all the necessary information to gain their commitment.
HOW TO GAIN VISIBILITY FOR YOUR PROJECT

You want your project to have high visibility in your community. How do you do that? Here are some helpful hints.

Publicizing Your Event – Before and After

- Ask permission to display flyers, posters or postcards at coffee shops, libraries, malls and local businesses. Invite local businesses to participate with you (as collaborators or co-sponsors).

Reach out to local media with a public service announcement (PSA)

- Many local newspapers, magazines, community guides, and radio and TV stations run PSAs on a range of events and projects. Your grassroots community betterment project is a perfect candidate for this type of mention, and the local press welcomes information about community events. Many media outlets have online forms on their websites to simplify event promotion.

Contact reporters

- Develop a list of local editors and reporters with their names, phone numbers and email addresses. Most newspapers and radio and television stations will list newsroom contact information on their websites. The reporters most interested in your announcement will be community editors.

- Journalists love a touching personal story. Shape your story to focus on the people in your community, and try to find an example of a person or small groups of people who will benefit from your effort.

- When emailing event details, use plain text without fancy graphics and include key logistics (who, what, when and where). Put the event’s date in the subject line. See below for a sample press release.

- Contact news outlets at least two weeks before the event.

- Follow up with reporters a few days before your event to push them to cover it. Reporters are always on the lookout for news, so don’t be shy. The worst that can happen is they say no. After your event, contact reporters to report your success. You will probably have fresh stories of how your project helped people. Offer to connect reporters with people you helped (provided those people are willing to talk to the press).

Consider Alternatives

- Use email networks and newsletters to get the word out.

- Write letters to the editor of your local newspapers announcing your event. Try to tie your project to a recent, relevant news item to increase the likelihood it will get published.

- Create flyers or poster-board notices and place them in locations with high traffic for better visibility.

Visit CreateTheGood.org for more opportunities, tools and ideas to help improve your community.
SAMPLE PRESS RELEASE

FOR IMMEDIATE RELEASE:

Contact Person: Jane Doe
Telephone Number: 555-555-5555
Fax Number: 555-555-5555
Email Address: jane.doe@email.com

Second Annual Repair Fair Needs You Tanner Heights, VA, July 9, 2011 – The City of Tanner Heights along with the Gemima County Homeowners Association will repair three seniors’ homes in the Tanner Heights community on Friday, September 9, 2011.

“We are hoping to get all three homes done and need volunteers with skills in plumbing, electricity and carpentry to help us out,” says Jane Doe, project organizer.

The Second Annual Repair Fair is an annual program that helps seniors in the community get free small home repairs so that they can live more comfortably and securely in their home. The group is comprised of community members wanting to help their neighbors.

For additional information, contact: Jane Doe 555-555-5555 or at jane.doe@email.com.
ADDITIONAL RESOURCES

Here are additional resources you can use when planning your community project:

HandsOn Network Volunteer Leader Guide -


Take Root: Project Development Guidebook -

Take Root: Volunteer Management Guidebook -
www.handsonnetwork.org/files/resources/GB_TakeRoot_Volunteer_Management_unkn_HON.pdf
Chapter 7: Evaluation of projects, programs, and interventions

What is evaluation?

Evaluation is the process of collecting information about a program or part of a program to allow for informative decision-making in regards to that program. The evaluation discussed in this section is for specific programs and projects rather than assessing the entire organization. The latter would be extremely time consuming and unnecessary in certain cases.

There are many reasons to evaluate and ways in which to do so. At least 35 types of evaluation have been identified including: needs assessments, accreditation, cost/benefit analysis, effectiveness, efficiency, formative, summative, goal-based, process, and outcomes. Your organization will choose an evaluation type based on the kind of information you hope to gather from the evaluation process. Do not focus too much on identifying a specific type or style of evaluation, but rather on collecting the most valuable information about your program. When it comes to evaluation 20% of the work will give you 80% of the information you need. It is always better to conduct some evaluation, even with average effort, than no evaluating at all.\(^1\)\(^2\)

Myths about evaluation:

1. The first myth is that evaluation generates a collection of boring useless data, rendering it an unnecessary activity and waste of time. On the contrary, evaluation is one of the most important steps in program development. In the past, evaluations frequently resulted in unusable data and/or obvious conclusion statements not lending well to program improvement. There was too much focus on scientific accuracy and not enough on relevance, practicality, and utility.\(^1\)

2. The second myth involves the belief that evaluation proves the success or failure of a program. It is often thought that a successful program is one that self-operates without the need for contact with employees/volunteers and those using the service. To be successful one must maintain a level of connection with all those involved in a program and continually evaluate.\(^1\)

3. The final myth is that evaluation requires outside experts to do it properly. Anyone in the organization can perform evaluations, however it does require thinking in a certain manner. Consider what kind of information you need to make program decisions and understand what is going on within the program. Additionally it is thought that evaluation is a long and complicated process which must be done a certain way and at a certain time. There are numerous ways to conduct evaluations and it does not have to take a long time.
On a daily basis organization members are doing some type of evaluation, it just is not formal.¹

**When to and why evaluate:**

Although not as exciting as planning and carrying out a program, evaluation is a key piece to successful community change. As mentioned in "what is evaluation", evaluating programs is not a new concept to organization members. Every day, whether you realize it or not, you partake in some kind of informal evaluation. Some examples of this are asking questions, consulting with partners, making assessments based on feedback, and using judgments to improve work. This type of evaluation is generally acceptable on a day-to-day basis, however when significant money is involved and a large number of people will be affected, a more formal evaluation is warranted. The evaluation should become more visible and justifiable.²

Evaluation should not only be performed after a program is complete, but also while the program is going on. If there is something you need to change, you do not want to wait until the program is over or a lot of time and money have been spent to find out. Evaluation measurements show how you are making a difference in the community. In order to follow your mission and increase sustainability, evaluating program outcomes and steps along the way become crucial.³

Evaluation benefits an organization both internally and externally. Outcomes and impact can be measured and shared with those in your organization (internally) and stakeholders (externally). A stakeholder will include anyone outside of your organization who cares about the program. This might be someone benefitting from the program (your target group), a person of influence in the community (elected officials), those with money invested in the program (funders), and also those opposed to the program (competition). While performing your evaluation ask yourself questions such as "who cares about our program?" and "what do they care about?". Aside from benefiting your target group, evaluating extremely important in maintaining and gaining new funding. When someone is giving you money, they want to see on paper the progress you are making.², ³

**Reasons for evaluation:**

1. To understand, verify or increase the impact of products or services on customers or clients.
2. Identify program strengths and weaknesses.
3. Improve delivery mechanisms, becoming more efficient and less costly.
4. Verify what you are actually doing is what you originally planned to do.
5. Facilitate thinking about program goals, how to meet them, and how to know when goals have been met.
6. Produce data/results for use by public relations and the promotion of organization services in the community.

7. Produce valid comparisons between programs to decide which should be retained, e.g., in the face of pending budget cuts.

8. Prove success of your program for use elsewhere.¹

Throughout this section the focus will primarily be on evaluation that is practical and ongoing, rather than heavily scientific and only conducted after program completion. Evaluation will involve program staff, community members, and stakeholders. This type of evaluation offers many advantages for community health and development professionals.¹

The role of evaluators:

Principles and roles of evaluators:

- "Systematic Inquiry: Evaluators conduct systematic, data-based inquiries about whatever is being evaluated.

- Competence: Evaluators provide competent performance to stakeholders.

- Integrity/Honesty: Evaluators ensure the honesty and integrity of the entire evaluation process.

- Respect for People: Evaluators respect the security, dignity and self-worth of the respondents, program participants, clients, and other stakeholders with whom they interact.

- Responsibilities for General and Public Welfare: Evaluators articulate and take into account the diversity of interests and values that may be related to the general and public welfare."⁴

An evaluator should demonstrate all of the above principles while performing their job. Additionally it must be taken into consideration that anyone evaluating who is also involved in the program will have a bias (intentional or not) while evaluating. Program managers want the program to be successful, and therefore want the results to show that. When possible have organization members not involved in the program perform the evaluation. Their bias will not be as strong, allowing them to critically analyze the strengths and weaknesses of the program. At the very least have someone uninvolved in the program interpret the evaluation results. It is also important to note that if your organization has the funds to hire outside help, it should be used first for identifying evaluation methods and
data collection. These are the more difficult pieces of the evaluation process which having an expert walk you through can be helpful.¹

**How to evaluate:**

1. **Guidelines for a successful evaluation:**

   *Six key steps of evaluation:* Use the following six steps as a guide and starting point for creating an evaluation appropriate for your organization and program.

   - **Engage stakeholders** - this includes people working on program operations, people served by your program, and funders.
   - **Describe the program** - what are your needs, the effects you expect to have, resources, stage the program is in, and logic model for success.
   - **Focus the evaluation design** - create an evaluation that reviews issues most important to stakeholders while using your time and resources efficiently.
   - **Gather credible evidence** - having solid evidence strengthens recommendations and decisions made for the program. *See note below*
   - **Justify conclusions** - link conclusions to evidence gathered throughout the process and judge conclusions based on the set values/standards of stakeholders.
   - **Ensure use and share lessons learned** - communicate decisions made and recommendations for implementation to program managers, follow up to ensure use, and share anything learned through the evaluation process with other organizations.⁵
Gathering credible evidence: Credible evidence is information which stakeholders view as reliable and relevant for answering their questions about your program. This type of information can be experimental, observational, qualitative, quantitative, or a mix. Having credible evidence on hand also benefits your organization by increasing the accuracy of data collected through evaluation. You can clearly see high priority items to work on, and where you are succeeding. Resources can then be used appropriately and time well spent. More information on this topic will be provided in the "Collecting usable data" section below.

Key questions to ask: When planning your evaluation try to answer the following questions.

- "For what purposes is the evaluation being done, what do you want to be able to decide as a result of the evaluation?"
- What aspects of the program will be considered when judging program performance?
- What standards (i.e., type or level of performance) must be reached for the program to be considered successful?
• What evidence will be used to indicate how the program has performed? From what sources should the information be collected, e.g., employees, customers, clients, groups of customers or clients and employees together, program documentation, etc.

• What conclusions regarding program performance are justified by comparing the available evidence to the selected standards?

• Who are the audiences for the information from the evaluation, e.g., customers, bankers, funders, board, management, staff, customers, clients, etc.?

• When is the information needed (so, by when must it be collected)?

• What resources are available to collect the information?

• How will the lessons learned from the inquiry be used to improve public health effectiveness?"

2. Collecting usable data

_Indicators:_ Coming up with good evaluation indicators are a way to answer the above questions. Indicators take a program concept and translate it into a reportable measure.

Examples of indicators:

• Program capacity to deliver services

• Participation rate

• Level of participant satisfaction

• Amount of intervention exposure (number of people exposed to the program, and length of exposure)

• Change in participant behavior

• Change in community conditions or norms

• Longer-term changes in population health status^2

_Sources:_ These can be people, documents, or observations. Certain sources will provide information in narrative form (personal experiences), where others will be numerical (number of program participants). Criteria used in selecting sources should be explicitly stated so that anyone analyzing the data can determine potential bias introduced.^2
**Quality:** Data collected throughout the evaluation should be high quality, reliable, and informative. Well defined indicators make quality data easier to collect. "Factors that affect quality may include instrument design, data collection procedures, training of those involved in data collection, source selection, coding, data management, and routine error checking."²

**Quantity:** This is the amount of data you collect through evaluation. Before beginning an evaluation decide how much data you want to collect and when you will stop collecting. Possessing more data is generally better, producing more reliable conclusions on weaknesses and strengths of the program.²

**Logistics:** This refers to methods, timing, and physical infrastructure of attaining and processing collected data. Keep in mind the culture of your community when gathering information from them. Norms dictate how you should approach members of the community. For example, some people will be more responsive talking to someone they know, over a stranger.²

3. Evaluation Plans:

*Evaluation style:* At the start of this section it was mentioned that there are numerous evaluation types and styles. You will choose a style based on the kind of information you are trying to gather about the program. Normally the information collected will be whatever is needed to make critical decisions about the program. Consider choosing one of the three most commonly used types to guide you; goals-based, process-based, or outcomes-based.¹

- **Goals-Based Evaluation** - This type of evaluation is for programs with very specific goals to meet and measures the extent to which those goals are being met. The following list of questions should be considered when designing this type of goals oriented evaluation:
1. "How were the program goals established? Was the process effective?
2. What is the status of the program's progress toward achieving the goals?
3. Will the goals be achieved according to the timelines specified in the program implementation or operations plan? If not, then why?
4. Do personnel have adequate resources (money, equipment, facilities, training, etc.) to achieve the goals?
5. How should priorities be changed to put more focus on achieving the goals?
6. How should timelines be changed (know why efforts are behind schedule before timelines are changed)?
7. How should goals be changed (know why efforts are not achieving the goals before changing the goals)? Should any goals be added or removed? Why?
8. How should goals be established in the future?"

• **Process-Based Evaluation** - This type of evaluation is for understanding how a program works and how results are produced. Process-based is especially useful when programs have been running for a long time and have undergone significant changes. It can be used when a program produces significant employee/volunteer or participant complaints. Funders and other outside organizations can also use it to understand how your program is running. The following list of questions should be considered when designing this type of process-based evaluation:

1. "On what basis do employees and/or the customers decide that products or services are needed?
2. What is required of employees in order to deliver the product or services?
3. How are employees trained about how to deliver the product or services?
4. How do customers or clients come into the program?
5. What is required of customers or client?
6. How do employees select which products or services will be provided to the customer or client?
7. What is the general process that customers or clients go through with the product or program?
8. What do customers or clients consider to be strengths of the program?
9. What do staff consider to be strengths of the product or program?
10. What typical complaints are heard from employees and/or customers?
11. What do employees and/or customers recommend to improve the product or program?
12. On what basis do employees and/or the customer decide that the product or services are no longer needed?

• **Outcomes-Based Evaluation** - The third type of evaluation is one that focuses on measuring outcomes of your program. This means seeing if your organization is taking the right steps to produce outcomes you set out to accomplish. When developing the program you would have initially stated several goals to benefit your target group. The goals, or benefits to the community, are your outcomes. Organization funders may ask for this type of evaluation, making it wise to keep this data on hand. You can measure outcomes by assessing enhanced learning (knowledge, perceptions/attitudes or skills) or conditions (increased literacy, self-reliance, etc.). Remember outcomes are not outputs (the number of people who went through the program). The following is a list of steps to complete an outcomes-based evaluation:

1. "**Identify major outcomes to examine or verify.** Some ideas for evaluation include reflecting on your mission and examining the impacts made on target groups from specific programs.

2. **Prioritize outcomes under examination.** After ordering outcomes by priority, start from the top of the list and work your way downward. If time and resources are limited you may only get to complete the first few. Choose wisely!

3. **Determine observable measures or indicators.** You need to establish indicators for your evaluation that suggest successful accomplishment of initial goals.

4. **Establish a target client goal for each outcome.** This "target" could be the percent of clients making a particular lifestyle change. For example, 75% of program participants will eat 3 servings of vegetables per day, as shown by the indicators listed in step 3. In the case of vegetable intake, your indicator might be collecting participants’ food journals to measure the number of vegetable servings consumed.

5. **Decide what information you need to show indicators.** In order to show if an indicator has been met, certain data is needed. For example: how many people went through the program, how many people completed food journals. With a new program make sure it is being carried out the way you originally intended.

6. **How will that information be efficiently and realistically gathered?** Some ways to do this include: program documentation, observation of program personnel and clients,
questionnaires and interviews about clients perceived benefits from the program, and case studies of program failures and successes.

7. Analyze and report the finding."

Levels of evaluation - While collecting information from participants think of collecting in these four areas.

1. Reactions and feelings
2. Learning (enhanced attitudes, perceptions or knowledge)
3. Changes in skills (applied the learning to enhance behaviors)
4. Effectiveness (improved performance because of enhanced behaviors)

Example evaluation report: Document your evaluation plan so stakeholders can review it and also for future internal review. An example layout is shown below.

1. "Title Page (name of the organization that is being, or has a product/service/program that is being, evaluated; date)

2. Table of Contents

3. Executive Summary (one-page, concise overview of findings and recommendations)

4. Purpose of the Report (what type of evaluation(s) was conducted, what decisions are being aided by the findings of the evaluation, who is making the decision, etc.)

5. Background About Organization and Product/Service/Program that is being evaluated
   a) Organization Description/History
   b) Product/Service/Program Description (that is being evaluated)
      I. Problem Statement (in the case of nonprofits, description of the community need that is being met by the product/service/program)
      II. Overall Goal(s) of Product/Service/Program
      III. Outcomes (or client/customer impacts) and Performance Measures (that can be measured as indicators toward the outcomes)
IV. Activities/Technologies of the Product/Service/Program (general description of how the product/service/program is developed and delivered)

V. Staffing (description of the number of personnel and roles in the organization that are relevant to developing and delivering the product/service/program)

6. Overall Evaluation Goals (e.g., what questions are being answered by the evaluation)

7. Methodology
   a) Types of data/information that were collected
   b) How data/information were collected (what instruments were used, etc.)
   c) How data/information were analyzed
   d) Limitations of the evaluation (e.g., cautions about findings/conclusions and how to use the findings/conclusions, etc.)

8. Interpretations and Conclusions (from analysis of the data/information)

9. Recommendations (regarding the decisions that must be made about the product/service/program)

10. Appendices: content of the appendices depends on the goals of the evaluation report, e.g.:
    a) Instruments used to collect data/information
    b) Data, e.g., in tabular format, etc.
    c) Testimonials, comments made by users of the product/service/program
    d) Case studies of users of the product/service/program
    e) Any related literature

4. Selecting the right tools:

There are a number of tools you can use to evaluate completed programs, projects, and interventions. Some of these tools include: standardized instruments, focus groups, review of case files, county/city identified outcomes, and comparison to baseline data. Depending
on the scope of your project, your evaluation tools will differ. Below is a list of possible collection tools with their purposes, advantages, and challenges.1

<table>
<thead>
<tr>
<th>Method</th>
<th>Overall Purpose</th>
<th>Advantages</th>
<th>Challenges</th>
</tr>
</thead>
</table>
| Questionnaires, Surveys, Checklists | When you need to quickly and/or easily get lots of information from people in a non-threatening way | o Can complete anonymously  
  o Inexpensive to administer  
  o Easy to compare and analyze  
  o Can administer to many people  
  o Can get lots of data  
  o Many sample questionnaires already exist | o Might not get careful feedback  
  o Wording can bias client's responses  
  o Are impersonal  
  o In surveys, may need sampling expert  
  o Doesn't get full story  
  o Inaccuracy of self-reported data |
| Interviews                         | When you want to fully understand someone's impressions or experiences, or learn more about their answers to questionnaires | o Get full range and depth of information  
  o Develops relationship with client  
  o Can be flexible with client | o Can take much time  
  o Can be hard to analyze and compare  
  o Can be costly  
  o Interviewer can bias client's responses |
| Documentation review               | When you want an impression of how the program operates without interrupting the program; from review of applications, finances, memos, minutes, etc. | o Get comprehensive and historical information  
  o Doesn't interrupt program or client's routine in program  
  o Information already exists  
  o Few biases about information | o Often takes much time  
  o Information may be incomplete  
  o Need to be quite clear about what looking for  
  o Not flexible means to get data; data restricted to what already exists |
| Observation                        | To gather accurate information about how a program actually operates, particularly about processes | o View operations of a program as they are actually occurring  
  o Can adapt to events as they occur | o Can be difficult to interpret seen behaviors  
  o Can be complex to categorize observations  
  o Can influence |
### Focus groups

To explore a topic in depth through group discussion, e.g., about reactions to an experience or suggestion, understanding common complaints, etc.; useful in evaluation and marketing.

- Quickly and reliably get common impressions
- Can be efficient way to get much range and depth of information in short time
- Can convey key information about programs
- Can be hard to analyze responses
- Need good facilitator for safety and closure
- Difficult to schedule for 6-8 people together

### Case studies

To fully understand or depict client's experiences in a program, and conduct comprehensive examination through cross comparison of cases.

- Fully depicts client's experience in program input, process and results
- Powerful means to portray program to outsiders
- Usually quite time consuming to collect, organize and describe
- Represents depth of information, rather than breadth

## Interpreting results:

1. **Review your evaluation goals.**

Remind yourself why you were evaluating in the first place. What are you attempting to measure? This will guide you in organizing and then analyzing your data.

2. **Analyze "quantitative" information:**

   - This applies to all ratings, rankings, and yes's and no's.
   - Make copies of collected data, storing the master copy in a safe place.
   - "Tabulate the information, i.e., add up the number of ratings, rankings, yes's, and no's for each question."
For data in the form of ratings and rankings, calculate a mean. For example, "for question #1, the average ranking was 2.4."¹

You can also state ranges for ratings and rankings questions. For instance, "20 people ranked "1", 30 ranked "2", and 20 people ranked "3"."¹

3. Analyze "qualitative" information:

- This applies to verbal answers in interviews, focus groups, or written commentary on questionnaires.
- "Read through all the data.
- Organize comments into similar categories, e.g., concerns, suggestions, strengths, weaknesses, similar experiences, program inputs, recommendations, outputs, outcome indicators, etc.
- Label categories or themes, e.g., concerns, suggestions, etc."¹
- Examine the data for any patterns, associations, or causal relationships present. For example did most people who attended your night at program have similar interests or concerns, or come from similar backgrounds and neighborhoods?
- Hold on to commentary for future reference for several years after evaluation.¹

4. Interpreting Information:

- Put the information in perspective by comparing the results to what you expected to find (what the program goals were).
- Make recommendations that are helpful to program staff.
- Make conclusions based on findings in regards to program goal completion.
- Record both your recommendations and conclusions in a report document with justifications.¹

To keep your organization healthy, take the time to evaluate your programs, and also your organization as a whole. More on this in the "Sustainable Communities and Organizations" section.
References:


Chapter 8: Sustainable communities and organizations

Sustainable communities:

1. What is a sustainable community?

In a sustainable community, "any resources consumed should be equal or less than the resources produced, whether the resources are produced by humans or the environment. In addition to a community providing sufficient resources, the system must be able to process the resulting wastes. A community is unsustainable if it consumes resources faster than they can be renewed, produces more wastes than natural systems can process or relies upon distant sources for its basic needs."1

Use of the word "local" in this toolkit refers to the area in which you live, work, and shop. This area will vary based on your living situation. For some it is a small town, whereas for others it is a larger city. A sustainable local community’s main goal is to meet basic needs while maintaining resources for the future. This type of community should be created by the community itself and maintained by those same people.1

The term "sustainable community" means different things to different people. It is important to keep this in mind when working on sustainability. For example, to a small shop owner sustainability means a stable economy for them to sell products, whereas a parent might consider it a safe place to raise children.1

2. Sustainable principles:

Whether starting a sustainable community from scratch or working to improve an existing one, you will need to decide what it ideally looks like. Use input from all community members to create a vision, if one does not already exist. As with any community work, you must understand what members want and need in order to attain success. There are however certain sustainability principles which apply to any community.1, 2

- The community must be economically and environmentally healthy.
- Social equity should be promoted and citizen participation in planning and implementation encouraged.
• The more input from the community you can achieve, the more sustainable the community will become.
• Sustainable communities will address areas such as job creation, energy use, housing, transportation, education and health.
• Assets should be inventoried and needed resources noted.
• Goals must be created along with indicators to evaluate the progress of those goals.1,2

3. Sustainable Measures:

Think of a community as being made up of three parts; the economy, society, and the environment. All three pieces are related and interact with one another in a certain way. The economy can be thought of as exchanges of goods or services. To be sustainable, it should build around renewable and local resources. Society includes the economy, but also friends, families, music, art, religion, and ethics. The environment includes both the economy and society, in addition to basic human needs (air, water, and food), energy, raw material, and transportation. Our current environment is heavily shaped by society’s actions. Keep all three community components in mind while planning for sustainability.1

While true sustainability must occur across an individual, community, national, and global scale, local organizations still have a lot of power to effect change. You can work to increase sustainability on an individual and community level. Ask yourself if the community is using resources faster than they can be renewed. What are the environmental limits? Recognize the impact the community is collectively having on the environment, and work toward improving those negatives. Think of ways humans can be beneficial to the environment.1
A large part of creating a sustainable community is ensuring it has a strong local food system. A strong system includes farmers and producers working together with community members. Farmers can prioritize growing products which community members want and in return the community can recognize the true value of farmers. Sustainability can also be thought of in regards to the environment. The creation of walking paths and parks in a way that helps the environment, rather than harms, is an example of this.

**Sustainable organizations:**

Now you should have a good understanding of what it takes to create and maintain a sustainable community. As an organization you can greatly impact the health of the environment around you. But what about the sustainability of your organization?

Many of the tips for acquiring new members and keeping them invested can be applied here as well. You must keep members happy and excited about the work your organization is doing. Without members (both general and board) your organization will cease to exist. The following is a refresher of tips presented in the "Attracting and Maintaining Members" section, which will enable your organization to be sustainable.

- Make participation easy
- Give them ample work to do
- Continue to show members the good, the bad, and the ugly
- Only hold meetings when necessary
• Rotate member positions
• Honor members that go above and beyond
• Encourage members to give talks at other organizations
• Conduct membership satisfaction surveys
• Contact members that have left the organization to seek out things to work on.
• Have members perform self-evaluations

Refer back to the "Attracting and Maintaining Members" section of the binder for more details on the above tips.

Having dedicated organization members is crucial to sustainability, however keeping the community involved is also key. They are the sole reason your organization exists. The information presented in the first half of this section can be used to maintain community involvement. For example, creating sustainable projects and programs will not only maintain community involvement, but also allow you to have a true impact and affect long-lasting change.

Programs and projects will be successfully sustainable if:

• They were created with a vision for the future balancing economic, environmental and social needs for generations to come.
• The vision was created utilizing the views and opinions of a wide range of community members.
• The community tracks the progress of a program in attaining the established vision.
References:


Chapter 9: 501(c)(3) Information

Basics of 501(c) organizations:

"A 501(c) organization, also known colloquially as either a 501(c) or a "nonprofit," is an American tax-exempt nonprofit organization. Section 501(c) of the Internal Revenue Code provides that 29 types of nonprofit organizations are exempt from some federal income taxes.

These include organizations who are religious, educational, charitable, scientific, or literary, as well as those testing for public safety, fostering national or international amateur sports competition, or preventing cruelty to children or animals."¹

General Compliance Issues:

"Under Section 511, a 501 (c) organization is subject to tax on its "unrelated business income," whether or not the organization actually makes a profit, but not including selling donated merchandise or other business or trade carried on by volunteers, or certain bingo games. Disposal of donated goods valued over $2,500, or acceptance of goods worth over $5,000 may also trigger special filing and record-keeping requirements."¹

"Tax exemption does not excuse an organization from maintaining proper records and filing any required annual or special-purpose tax returns. Previously, annual returns were not generally required from an exempt organization accruing less than $25,000 in gross income yearly. However, from 2008 onwards, many such organization must file a yearly "e-Postcard" known as Form 990-N, or risk losing their exemption, with the maximum accrual being $50,000 to file a 990-N now. Form 990-N must be submitted electronically using an authorized IRS efile provider. Other types of Form 990 may be submitted via mail and some are available electronically through an IRS efile provider."¹

"Failure to file required returns such as Form 990 may result in monetary fines of up to $250,000 per year. Exempt or political organizations (excluding churches or similar religious entities) must make their returns, reports, notices, and exempt applications available for public inspection. The organization’s Form 990 is generally available for public inspection and photocopying at the offices of the exempt organization, through a written request and payment for photocopies by mail from the exempt organization, or through a direct Form 4506-A "Request for Public Inspection or Copy or Political Organization IRS Form" request to the IRS of the exempt organization filing of Form 990 for
the past three tax years. The Form 4506-A also allows the public inspection and/or photocopying access to Form 1023 "Application for Recognition of Exemption" or Form 1024, Form 8871 "Political Organization Notice of Section 527 Status," and Form 8872 "Political Organization Report of Contribution and Expenditures." Internet access to an organization's 990 and some other forms are available through information services such as GuideStar. Failure to file such timely returns and to make other specific information available to the public also is prohibited."1

501(c)(3) specifics:

"501(c)(3) exemptions apply to corporations, and any community chest, fund, cooperating association or foundation, organized and operated exclusively for religious, charitable, scientific, testing for public safety, literacy, or educational purposes, to foster national or international amateur sports competition, to promote the arts, or for the prevention of cruelty to children or animals. There are also supporting organizations which are often referred to in shorthand form as "Friends of" organizations."1

"Another provision provides a deduction for federal income tax purposes for some donors who make charitable contributions to most types of 501(c)(3) organizations, among others. Regulations specify which such deductions must be verifiable to be allowed (e.g., receipts of over $250). Due to the tax deductions associated with donations, loss of 501(c)(3) status can be highly challenging to a charity's continued operation, as many foundations and corporate matching programs do not grant funds to a charity without such status, and individual donors often do not donate to such a charity due to the unavailability of the deduction.
Testing for public safety is described under section 509(a)(4) of the code, which makes the organization a public charity and not a private foundation, but contributions to 509(a)(4) organizations are not deductible by the donor for federal income, estate, or gift tax purposes."1

The two exempt classifications of 501(c)(3) organizations are as follows:

1. "A public charity, identified by the Internal Revenue Service (IRS) as "not a private foundation", normally receives a substantial part of its income, directly or indirectly, from the general public or from the government. The public support must be fairly broad, not limited to a few individuals or families. Public charities are defined in the Internal Revenue Code under sections 509(a)(1) through 509(a)(4).

2. A private foundation, sometimes called a non-operating foundation, receives most of its income from investments and endowments. This income is used to make grants to other organizations, rather than being disbursed directly for charitable activities. Private foundations are defined in the Internal Revenue Code under section 509(a) as 501(c)(3) organizations, which do not qualify as public charities."1

Qualifying exemption requirements for a 501c3:

"To be tax-exempt under section 501(c)(3) of the Internal Revenue Code, an organization must be organized and operated exclusively for exempt purposes set forth in section 501(c)(3), and none of its earnings may inure to any private shareholder or individual. In addition, it may not be an action organization, i.e. it may not attempt to influence legislation as a substantial part of its activities and it may not participate in any campaign activity for or against political candidates."2 More details on this topic are provided later in the section.

"Organizations described in section 501(c)(3) are commonly referred to as charitable organizations. These organizations are eligible to receive tax-deductible contributions in accordance with Code section 170. The organization must not be organized or operated for the benefit of private interests, and no part of a section 501 (c)(3) organization's net earnings may inure to the benefit of any private shareholder or individual. If the organization engages in an excess benefit transaction with a person having substantial influence over the organization, an excise tax may be imposed on the person and any organization managers agreeing to the transaction."2

How to start a 501c3:
I. Create and Name Your Nonprofit

1. "Determine what type of nonprofit organization you want to create. Choose an issue that is important to you or something that is a matter of public interest. Such issues may include arts, charities, education, politics, religion, research or some other non-commercial endeavor."³

2. "Choose a name for your organization. Although each state has its own set of regulations, you can expect 3 general rules to apply:

   - The name cannot be the same as the name of any other corporation on file with the state’s corporations division.
   - About half of all states require the name to end with a corporate designator, such as Corporation (Corp.), Incorporated (Inc.) or Limited (Ltd.)
   - Your name cannot contain certain designations reserved for the state, such as United States, Reserve, Federal, National, Cooperative or Bank."³

3. "Apply for the name that you’ve chosen. Take the following steps:

   - Visit your state’s filing office website or call your state’s corporations division. Ask to see if the name is available or if it is already taken.
   - If the name is available, then you can usually pay a small fee that will reserve the name for you until you have filed your Articles of Incorporation. If the name is taken, then create another name."³

4. "Formulate your mission statement. As a nonprofit organization, you exist to accomplish your mission based upon your purpose, services and values.

   - The mission statement is a concise expression that covers in one or two sentences the name of the organization, what it does, for whom it performs services and where it dispenses service. It should also portray how your organization is distinct from others like it.
   - Make your mission statement compelling. It will be used in all published materials, funding requests and public relations handouts."³

5. "Hire an attorney. Your attorney will help you with your Articles of Incorporation and the bylaws."
• Hire someone with 501c3 experience to help you file your state and federal exemption forms. You’ll save both time and money in the long run.

• Most paralegals and attorneys have little experience with nonprofits. You can usually check out these services via the state bar association, references from fellow nonprofit owners, or the Better Business Bureau."³

II. File the Necessary Documents

1. "File articles of incorporation. Articles of Incorporation are official statements that you are creating an organization, and they are filed with a state’s corporations office

• Articles of Incorporation protect both board and staff from legal liabilities incurred by the organization, making the corporation the holder of debts and liabilities instead of placing responsibility with the individuals and officers who work for the organization.

• The specific requirements governing how to incorporate are determined by each state. You can obtain the information you need to proceed with this step from the state Attorney General’s office or the Secretary of State’s office (access Secretary of State information here: http://www.sos.la.gov/Pages/default.aspx)

• These official documents may have different names in different states. For example, you may see names like 'corporate charter, trust instrument, or articles of association.'

• Before you spend any money, consider consulting with an attorney who is experienced in the area of nonprofit law. This step will help you to avoid many mistakes that people make when they try to incorporate without legal representation."³

2. "Apply for a federal employer identification number. Regardless of whether or not you have employees, nonprofits are required to obtain a federal Employer Identification Number (EIN), which is also referred to as the federal ID number.

• This number is used to identify the organization when tax documents are filed and is used not unlike an individual’s Social Security Number.
• If you received your number prior to incorporation, you will need to apply for a new number under the corporate name. Ask for Form SS-4 when applying for your EIN.”³

III. Develop a Financial Structure

1. "Hire a certified public accountant (CPA). Consider the following factors:

   • Look for an accountant who has experience with organizations like yours. Someone who's never worked with a 501c3 may not have the experience to handle the nuances of the process.

   • Make sure that you feel comfortable with the person. The person should be reliable, should listen to your concerns, and should respond to requests as soon as possible.

   • Choose a firm that matches the size of your nonprofit. If you're a small 501c3, then choose a CPA who works alone or for a small firm. For large nonprofits, choose a large firm with a good reputation.

   • Take time to make your choice. Look for referrals and references and interview different candidates so that you make the best choice from a pool of available accountants."³

2. "Develop a budget. Creating a budget is often one of the most challenging tasks when creating a nonprofit organization. A budget is the expression, in financial terms, of
the plan of operation designed to achieve the objectives of an organization. New organizations may start the budgeting process with their accountants by looking at potential income and then figuring out how much money they have to spend."3

3. "Develop a record-keeping system. Legally, you must save all Board documents including minutes and financial statements.

- You will have to preserve your important corporate documents, including board meeting minutes, bylaws, Articles of Incorporation, financial reports and other official records.

- You should contact your appropriate state agency for more information on what records you are required to keep in the official files."3

4. "Develop an accounting system in partnership with your CPA. Nonprofits are accountable to the public, their funders (contributors), and, in some instances, government granting bodies.

- You have to establish a system of controls (checks and balances) when establishing the organization’s accounting practices. Make sure that your system meets both your current and your anticipated future needs.

- The organization needs to open a bank account and decide whether to use the accrual or cash method of accounting. The difference between the two types of accounting is when revenues and expenses are recorded.
  
  o In cash basis accounting, revenues are recorded when cash is actually received and expenses are recorded when they are actually paid (no matter when they were actually invoiced).

  o In accrual basis accounting, income is reported in the fiscal period it is earned, regardless of when it is received, and expenses are deducted in the fiscal period they are incurred, whether they are paid or not."3

IV. Apply for Federal and State/Local Tax Exempt Status

1. "Apply for recognition of tax-exempt public charity status. You’ll need to fill out either Form 1023 or 1024, which is an application. Publication 557 will provide detailed instructions for filling out either form and will let you know which one, 1023 or 1024, your organization needs to file."
• Submit financial statements for the current year as well as budgets for the next 2 years in Part XI of Form 1023.

• If an attorney is representing you, fill out Form 2848 to designate power of attorney.

• Either can be obtained from your local IRS office or the IRS website. The filing fee will depend upon the size of your organization's budget. This application is an important legal document, so seek the assistance of an experienced attorney or certified public accountant (CPA) when preparing it."3

2. "Send your forms to 1 of the following addresses:

• For applications sent by regular mail:
  Internal Revenue Service
  P.O. Box 12192
  Covington, KY 41012-0192

• For applications shipped by express mail or delivery service:
  Internal Revenue Service
  201 W. Rivercenter Blvd.
  Attn: Extracting Stop 312
  Covington, KY 41011"3

3. "Ask the IRS to expedite your application if you can. The IRS usually considers applications in the order in which they are received. They may be willing to expedite your application if you have a pending grant that is necessary for continued operation, if your newly created organization is providing relief to disaster victims or if IRS delays have caused significant problems with the release of a determination letter."3

4. "File for state and local tax exemption. In accordance with state, county, and municipal law, you may apply for exemption from income, sales, and property taxes. Contact your state Department of Revenue, your county or municipal Department of Revenue, local Departments of Revenue and your county or municipal clerk’s offices for information on how to apply for exemption in your state or municipality."3 Find Louisiana Department of Revenue information here: http://revenue.louisiana.gov/.
V. Organize Your Corporation After Receiving Your Letter of Determination

1. "Draft bylaws. Bylaws are simply the "rules" of how the organization operates. Although bylaws are not required to file for 501(c)(3) status, they will help you in governing your organization.

   • Bylaws should be drafted with the help of an attorney and approved by the board early in the organization’s development.

   • Depending on who you use to assist in the process, some firms require that your bylaws are sent to the IRS."³

2. "Form a Board of Directors. Forming a board requires careful thought and extensive recruitment efforts.

   • Each state has regulations that determine the minimum size of the board, which is typically 3, 5, or 7, but the optimum number of people who sit on the board should be determined by the needs of the organization.

   • Based on what your organization would like to accomplish, you should decide what special skills and qualities you will require of the individuals on your board. Identify qualified individuals who are supportive of your mission and are willing to give of their talents and time.

   • Include the community at large, not just your specific community of focus (e.g. the mental health community). Consider the religious community, local service clubs, legal professionals and colleges and universities as sources for a prospective Board of Directors. Do not overload people who already serve on many committees so that you can seek a balance between old and new leadership."³

3. "Fulfill charitable solicitation law requirements. If your organization's plans include fundraising, be aware that many states and a few local jurisdictions regulate organizations that solicit funds within that state, county, or city.

   • Usually compliance involves obtaining a permit or license and then filing an annual report and financial statement.
• Contact the state Attorney General’s office, the state Department of Commerce, state and local departments of Revenue and county or municipal clerk’s offices to get more information.”

4. “Apply for a non-profit mailing permit. The federal government provides further subsidies for nonprofits with reduced postage rates on bulk mailings.

• While first-class postage rates for nonprofits remain the same as those for the for-profit sector, second- and third-class rates are substantially less when nonprofits mail to a large number of addresses.”

VI. Tips

"You may want to secure a domain name that matches the name of your proposed organization if you decide to create a website. Design a logo and tagline that will help distinguish your organization from others as well as represent your mission. Make sure to create a copyright.”

VII. Warnings

"File your 1023 within 27 months of the date when your organization was established, or when your Articles of Incorporation were filed. Although the IRS may approve an additional extension under certain circumstances, missing the deadline may result in your charity or foundation not getting 501(c)(3) recognition retroactive to its incorporation date.”

VII. Things you will need

"Organization name, mission statement, attorney specializing in non-profit law, articles of incorporation, Federal Employee Identification Number, CPA, budget, record-keeping system, accounting system (cash or accrual), IRS form 1023 or 1024, IRS publication 557, IRS form 2848, state and local exemption paperwork, bylaws, board of directors, permits and licenses, fee waivers for any of the permits and licenses that may be available, nonprofit mailing permit, and business plan.”

Noteworthy 501(c)(3) restrictions:

1. Elections:
"Under the Internal Revenue Code, all section 501(c)(3) organizations are absolutely prohibited from directly or indirectly participating in, or intervening in, any political campaign on behalf of (or in opposition to) any candidate for elective public office. Contributions to political campaign funds or public statements of position (verbal or written) made on behalf of the organization in favor of or in opposition to any candidate for public office clearly violate the prohibition against political campaign activity. Violating this prohibition may result in denial or revocation of tax-exempt status and the imposition of certain excise taxes. An organization that loses its 501(c)(3) status because it’s engaged in political activities cannot then qualify for 501(c)(4) status.

Certain activities or expenditures may not be prohibited depending on the facts and circumstances. For example, certain voter education activities (including presenting public forums and publishing voter education guides) conducted in a non-partisan manner do not constitute prohibited political campaign activity. In addition, other activities intended to encourage people to participate in the electoral process, such as voter registration and get-out-the-vote drives, would not be prohibited political campaign activity if conducted in a non-partisan manner.

On the other hand, voter education or registration activities with evidence of bias that:

a) would favor one candidate over another
b) oppose a candidate in some manner; or
c) have the effect of favoring a candidate or group of candidates

will constitute prohibited participation or intervention.

The Internal Revenue Service provides resources to exempt organizations and the public to help them understand the prohibition. As part of its examination program, the IRS also monitors whether organizations are complying with the prohibition."

2. Lobbying

"In contrast to the absolute prohibition on political campaign interventions by all section 501(c)(3) organizations, public charities (but not private foundations) may conduct a limited amount of lobbying to influence legislation. Although the law states that "No substantial part..." of a public charity’s activities can go to lobbying, charities with large budgets may lawfully expend a million dollars (under the "expenditure" test), or more (under the "substantial part" test) per year on lobbying. To clarify the standard of the "substantial part" test, Congress enacted 501(h) (called the Conable election). The section establishes limits based on operating budget that a charity can use to determine if it meets"
the substantial test. This changes the prohibition against direct intervention in partisan contests only for lobbying. The organization is now presumed in compliance with the substantiality test if they work within the limits. The Conable Election requires a charity to file a declaration with the IRS and file a functional distribution of funds spreadsheet with their Form 990. IRS form 5768 is required to make the Conable election.”

References:


Chapter 10: Fundraising and money sense

Fundraising:

Basics of fundraising:

"Fundraising is the process of soliciting and gathering voluntary contributions of money or other resources, by requesting donations from individuals, businesses, charitable foundations, or governmental agencies."¹ In this section different types of fundraising, steps to take, and tips for success will be discussed. Types of fundraising include corporate sponsorship, grants, individual donations, and generating funds through events, services, and products. These are all discussed in detail below.

"When you’re applying for new funding or to a new funder. It’s important under these circumstances to clarify your vision and mission so that any funding you seek supports what your organization actually stands for. Otherwise, you can wind up with strings attached to the money that require you to take a direction not in keeping with your organization’s real purpose or philosophy."²

Determining a fundraising goal:

Having a particular fundraising goal will be helpful for raising money for specific projects. Decide how much you need and compare it with how much you can realistically expect to raise in the time period you have. It can be very difficult to calculate this number. You should recruit the help of whoever oversees finances in the organization. The number you come up with should be the difference between your organization’s income and expenses. These expenses should include any and all fundraising costs. You need to set a defined goal to reach and not just shoot for some number. This will allow you to only undertake fundraising efforts that will raise enough money relative to the time and effort put into them.³ Take the following into consideration.

- How much money you require to meet the needs and goals identified from fundraising and to continue your organization’s work
- Amount of money raised last year
- What can reasonably be raised this year
- Minimum your organization needs to get by
- Amount that will cover projected expenses³
Healthy Fundraising:
Fundraising presents a unique opportunity to incorporate healthy eating and physical activity into your efforts. There are many ways to fundraise that will at the same time benefit the community. Some suggestions are listed below.

- Fun Run, obstacle course race, and other creative short 5k races
- Walk-a-thon, Bike-a-thon, Dance-a-thon, Bowl-a-thon, Climb-a-thon, Water-a-thon
- Sports competitions with teams from the community (i.e. firemen, policemen, teachers, parents, local high school team, etc.)
- Skating night
- Healthy bake sale
- Put together fruit baskets, or work with companies who do, to sell to the community (try to use fruit that is in season)
- Sale of edible plants, seedlings, and seeds
- Partnering with a healthy food company to sell things like spices, grains, beans, whole grain flours, whole grain pastas and breads, trail mix, nuts, seeds, granola bars, sauces & dressings, 100% fruit jams, fruit & yogurt parfaits, and fruit smoothies.
- Put together and sell an organization cookbook of healthy recipes contributed by members
- Sale of healthy cookbooks and other health/fitness books
- Work with farms to sell passes for farm walking tours, receiving part of the profit
- Selling water bottles with your organization name on them
- Selling other active gear with organization name or logo
- Grocery store fundraiser pairing up with a local supermarket to have a percentage of sales on a particular day go to your organization
- Consider asking a local healthy restaurant to donate a percentage of community members’ purchases for a night
- Recycling collection for products that your organization can sell to recycling companies (clothing, printer cartridges, cell phones, etc.)
Sponsorship:

I. The basics of sponsorship:

When it comes to getting sponsorship it may seem difficult at first, however the process is actually easier than you would think. In fact sponsorship can be attained for almost anything, including travel expenses, event fees, equipment, and even cash payments to get started. These opportunities are out there in the hundreds, if not thousands, for organizations of all sizes and working on all types of issues. Generally the biggest obstacle to getting sponsorship is not taking any action and doing nothing.5

How does sponsorship help? One of the main reasons for getting sponsorship is to free up your limited organizational funds for use on projects, programs, and basic functioning. The good news is that once you have one sponsor, it will become easier to attract more. Potential sponsors will see you as "valuable," because someone else clearly already does. It may be more challenging to get that first sponsor, but by taking certain steps you can make the process easier.5 Steps to take will be explained and tips provided throughout this section.

What do you need? Think about what you need out of a sponsor, what do you need funding for the most? You can approach the situation by assessing needs of the entire organization, or just funding needed for a single event. As previously stated, you can get sponsorship for practically anything. Once you have decided what you need funding for you may begin asking sponsors for money.5

Who do you know? After deciding what you need from a sponsor, you can begin looking for potentials. Appropriate sponsors "should be sympathetic and supportive of your cause and be able to provide funding and/or services."5 Create a list of contacts to reach out to based on who you and other members of your organization know. Get creative when coming up with this list, including anyone who might be a potential sponsor. List individual people,
not organizations or companies. Contacting individuals will prove to be more successful than trying to get sponsorship from an entire organization.5

How do you ask? Start by making contact with individual people who may or may not be part of a larger organization. The way in which you ask someone for money will differ based on your personality. It should always have a personal touch. When your organization is forming its list of potentials, be sure to note any existing relationships that exist and details about the person you are aware of. Note similarities or areas of interest in common too. You may reach out to the potential sponsor through email, a letter, phone call, face-to-face meeting, or a combination of those. Choose the method most comfortable to you, keeping in mind the method most appropriate for the individual you are reaching out to.5

What can you provide and how can you credit your sponsors? All sponsors want to be recognized in some way for their donations. Be prepared as an organization to tell sponsors how you will do this. Have a plan laid out when you meet with them, be creative here. Some sponsorship recognition ideas for individual events include: name display or company logo at check-in, in the main event room, on guest tables, event fliers, invitations, and your organization’s website. You can verbally recognize sponsors at events and to the media. Sponsors will appreciate the name recognition in the community.5

II. Are you ready for sponsorship?

Use the following checklist to gauge organization readiness:

- "Do you have an established marketing effort in place so that you keep in touch with your constituents through e-mail, a website, events, newsletters, conferences, television, radio or print advertising?

- What do you know about your organization’s demographics? Is there recent information about who participates and why? Where they live? How far they drive? Whether they are repeat users? Whether they are young families, empty nesters, or teens?

- Have you worked with corporate sponsors before? Do you have testimonials from corporate executives about the value of your organization? Do you feature those in press kits or other marketing materials?

- What is the competitive environment like? Are other organizations similar to yours getting corporate sponsorships?

- To gauge the effort involved in reaching corporate sponsors and meeting face-to-face, create a list of companies headquartered in your area. What do they produce, and to whom do they sell? Are there cross-promotions you can work up that will help them sell to one of your existing sponsors or team up with an existing sponsor?
• Are you a member of civic organizations made up of business people, so that you can gain insight and entrée into the business community?

• Is there an entrepreneurial spirit in your organization? Are new ideas welcomed, and do they receive thoughtful consideration? Have other commercial or revenue-generating initiatives been realized over the past five years?7

III. Steps to take:

1. Identify potential sponsors

Look for companies that sponsor other events or activities similar to yours. You can also do some research on past events in your community. Find ones similar in nature to your program or project and see who sponsored their events. Reach out to those sponsors and see what they can do for your event. Clearly they are interested in the cause having sponsored a similar event before. Research by other non-profits might be available and of use to you. Contact them for sponsorship advice. Below are some sponsorship ideas relevant to particular events.

• Athletic events: Nike, Adidas, Livestrong, and other sports-related organizations
• Music events or concerts: Local radio stations, music publications, and other ventures
• Food events: Gourmet magazine, the Food Network, and other big food conglomerates.7

Create a list of potential sponsors starting big, including everyone you might consider asking. You will want to start slimming down the list before you start actually asking sponsors. If you have had sponsors in the past, include them in the list. Also include those who have sponsored events similar to yours in the past. Before asking people on your list for sponsorship, do some background research to learn a little bit about them. When you do ask for sponsorship it will go a long way if you know something about the organization. You should also have reasons of how the organization will benefit from sponsoring you. Learn about the organization's business model and their goals. Contacting local businesses and companies may be more fruitful than trying to get sponsorship from large organization. Even though large corporations have more money, they also receive many more sponsorship requests.7

2. Create a sponsorship packet

In the process of getting sponsorship, you may consider creating a sponsorship packet. This will start with an executive summary to showcase what your organization has to offer and grab the attention of potential sponsors. It should include your mission statement and some information about future programs you plan to execute. Sponsors will want to know
what they will be sponsoring. The letter should be tailored to the recipient and showcase how much you know about them. Thank the sponsor for their time and be sure to use a friendly yet professional tone throughout.  

Outline how much money your organization is hoping to acquire throughout sponsorship. Provide potential sponsors with different options or levels to donate at. You should explain what each level demands and why sponsorship at each level is needed. Provide sponsors with a call to action. This can be a form for sponsors to fill out and send back or you might provide your contact information. Potential sponsors need a task to complete to keep the process moving forward. Because the market you are writing to is limited on time, you will want to keep any written materials brief and to the point. Say everything you need to say, but keep it as condensed as possible.  

3. Send out packets  

Although it may be tempting to send packets out to every organization, you will want to be more specific. Only send packets to places you honestly think will sponsor you. Each packet that you send out must be unique to the organization receiving it. After you have sent the packets, follow up with a phone call. Be sure the organizations got the packets, answer any questions they have, and that they know how to contact you with a decision. Each sponsor will pledge different amounts of money. How will you treat and recognize your different sponsors? You want them to continue to sponsor you year after year, so keeping them happy is ideal.  

IV: What is Fiscal Sponsorship?  

Somewhat different than sponsoring an event or an organization, fiscal sponsorship is "an arrangement in which one entity agrees to accept and manage funds for another. Within the nonprofit sector, fiscal sponsorship usually occurs when a group or an individual wishes to receive tax-exempt contributions for charitable or community-focused activities without building a full organizational infrastructure or receiving formal 501(c)3 status."  

Fiscal sponsors...  

- Typically only sponsor projects with a charitable purpose consistent with their own mission.  
- Commit to supporting the charitable activities of individuals or unincorporated groups by extending its tax-exempt status to include them, allowing donors to make tax-exempt contributions.  
- Receive and administer charitable contributions on behalf of the sponsored organization.
• Accept significant legal and financial risk, so it is critically important that fiscal sponsorship be offered by organizations that are well-informed of the risks and structured to manage and accept those risks.

• Typically charge an administrative fee for their services, usually a percentage of the budget of the sponsored organization or program.\(^8\)

**Benefits of fiscal sponsorship:**

• Ability to receive tax-deductible donations. A donor that contributes to a project through a fiscal sponsor with 501(c)(3) status may normally deduct the contribution as a charitable contribution deduction. Those funds will then be directed to the project to assist the project with running its programs.

• Ability to get off the ground faster. Fiscal sponsorship might be chosen by a newly formed nonprofit that seeks to test-drive its ideas, or operate less formally than what is required of groups that make the commitment to apply for tax-exempt recognition from the IRS.

• Wider base of support. If the organization that acts as a fiscal sponsor has a solid track record with foundations and other funders, this may benefit a “project” of that organization. Projects that don’t already have pre-existing relationships with funders may be in a better position to secure some grants or charitable donations if they have a fiscal sponsorship relationship with a reputable charity.

• Technical assistance and administrative support. Many sponsors may also provide projects with additional support such as insurance, payroll and accounting services, office space, publicity, capacity building or fundraising assistance. This support not only makes it possible for projects to focus more time and energy on their missions and less on administrative matters, but, due to economies of scale, may also be provided at lower cost to a project than the project might have to pay if it incorporated on its own.

• Potentially Lower Insurance Costs. Often, sponsors will be able to obtain lower insurance rates than would be available to a small start-up nonprofit corporation, and these savings can be passed.\(^8\)

**Tips for finding fiscal sponsorship:**

• Look for nonprofits with similar missions to yours. "You might start with your current affiliations. Make a list of the professional societies, educational associations and institutions, religious organizations, social and recreational clubs, and other groups with which you are already associated, including employers."
The Fiscal Sponsor Directory allows you to search by state, service category, or keyword for nonprofit fiscal sponsors. Profiles include eligibility requirements, fees, services, and types of projects supported. The site also provides statistics and resources on fiscal sponsorship.8 Access the site here: http://www.fiscalsponsordirectory.org/.

"The National Council of Nonprofits also provides very helpful suggestions for Fiscal Sponsorship Resources including further tips and tools for finding a fiscal sponsor."8 Access the site here: https://www.councilofnonprofits.org/.

V. Sponsorship trends:

Paired with the economic recession over the past several years, sponsorship trends have also slowed. Now that the economy is making a comeback, so are available sponsorship opportunities. Companies are now looking for "fresh perspectives and a way to try and reach their potential clients once again." The traditional forms of advertising are beginning to seem outdated and advertising through sponsorship may present a new potential avenue. These companies will be looking specifically for organizations with advertising potential. For this reason, it is crucial your organization have an advertising plan prepared for potential sponsors.9

It may seem obvious, but sponsors want to know how your organization is different than any other organization they could sponsor. Get creative in your approach and think outside the box. First impressions matter here. As much as 68% of all sponsorship dollars are spent in the field of sports. Keep this in mind if your organization is trying to get funding for a sporting event. While this high percentage might seem daunting to those organizations not in the world of sports, do not fret as all areas of sponsorship are expected to increase over the next few years. Remember to "tie your product or service to something that is becoming of increasing interest within society."9 This way potential sponsors will be more interested in partnering with you.

VI. Sponsorship tips:

For the organization as a whole -

• Don’t be afraid to ask. Most organizations with money to sponsor do not simply because no one asks them.

• Don’t be discouraged by a "No." Sometimes no does not actually mean no, but means at some other point in time. You can build a relationship with the organization in the meantime and follow up with them about sponsorship down the road.

• Plan ahead. Many organizations have set giving cycles where they distribute the allotted sponsorship money they have. It would be advantageous to your
organization to find out when this cycle is and lock down sponsorship money early in the cycle.

- Use media and do the work. You can use various forms of media to promote your organization and what a partnership would mean. You can offer to do the leg-work to showcase all your sponsor is helping you to accomplish.

- Form a lasting partnership. To sponsor your organization, companies need to "buy-in" to your mission and the work you are doing. They should feel like your partner enabling you to accomplish your goals. They may have a similar mission and goals. They will also be more likely to sponsor you year after year if they're on the same page with you.

- Remember to thank your sponsors. Sending out letters is nice, however you could also consider a ceremony to recognize them.

- Stay in touch. Sponsors want to see the progress your organization is making. Keep them updated on your efforts. Send them things such as event pictures and organization newsletters.\textsuperscript{10, 11}

\textit{Tips for specific events -}

These tips will be very similar to ones used to receive entire organization sponsorship. The difference here is that funding will be in smaller amounts, might just be for a onetime event (not yearly sponsorship), and it may be needed faster.

- Research how your potential sponsors’ interests relate to your project or event.

- Know what you can offer these sponsors at the event (name recognition, access to their target audience).

- Use language similar to your sponsors. Look on their websites, etc. to see how they speak.

- Understand how your event is unique and better suited to the sponsor company than other similar events.

- Pitch your sponsorship proposal in the company’s 4th quarter when possible. This is when many sponsorship decisions are made. Ensure adequate time for the decision to be made and when you need the money.

- Understand who the decision makers are in the company. You can increase your chances of being sponsored by targeting them.
• Draft specific goals and objectives for your project or program. Have "benchmarks" for your organization to periodically meet to show progress of the goals to sponsors.12

Donations and generated funds:

When considering what type of fundraising to undertake, consider using a combination of many types. Do not limit your organization to just one type, but do not stretch yourself too thin by trying multiple methods either. Chose methods best suited for your organization and that you can reasonably follow through with.

Types of donations:

• *Small individual donations* - Getting donations from individuals in the community show support and approval of your organization’s mission and goals. They are on board with what you are doing and appreciate your work. Some methods for attaining individual sponsorship include: direct mail appeals, newsletters, social networking, special events, cash, pledges, and stock in your company.13

• *Large individual donations* - If you are lucky, you will come across some individuals who will want and be able to donate large sums of money to your cause. As an organization you must reach out to these individuals first. You can request these donations during meetings with these individuals. You should bring one or two members of your organization and a plan to get the donors on board. You could also attempt to gain large donations through tours and trips, parties, auctions, or gala events.13

• *Annual Fundraising* - This type of fundraising is to raise enough money for a yearlong project. Organizations start fundraising at a particular date and raise as much as they can until the designated end date. Here you want to contact your list of past donors or contacts you have who you believe would be likely to contribute. Once you develop an effective way to collect money and have found those organization members good at doing so, you can reuse those methods and members for fundraising every year. You will want to fundraise every year to provide you with the needed money to complete projects and programs. This method will be the one of focus throughout the remainder of the section.13

• *Minor Donor Groups* - It can be hard to get major donor groups, but minor donor groups can be easier. These groups target givers who normally give $50-$500 per year. "Use minor donor groups to target smaller givers with the goal of motivating them to stay supportive of your organization and give at a consistent level each year."13
- **Corporate or Business fund** - Here a larger company will give your organization a big donation. You will learn over time who to ask, and what companies are likely to care about your specific cause. The donation to a nonprofit looks good for the company. For more information on this, revisit the sponsorship portion at the beginning of this section.

**Ways to generate funds:**

- **Cause related marketing** - This unique type of marketing includes pairing up with a company and selling their product for them, receiving a cut of the profit. Look closely into the profit package to make sure you are getting a good deal.

- **Planned giving** - Here a donor pledges to give a specific monetary amount on certain events. These events could be on the donor’s birthday, when they receive their salary, or when they pass. This is a way to ensure having specific donations, often within a certain timeframe.

- **Fees for services** - This can be done through selling products or charging for services your organization offers. It is legal to sell goods as a nonprofit. “The only limitations are the IRS requirement of 501(c)(3) groups that their sales activities not take over the purpose of the organization and your nonprofit’s willingness to pay some taxes on the profit.” If you plan on doing a raffle or races, first check with state law to see if games are legal. As a nonprofit you may need to get a special permit.

- **Company assistance** - Companies can help their employees give to nonprofits and may even match their donations. Corporate funding can be good for new initiatives, special programs, and special events.

**Fundraising ideas:**

When it comes to fundraising most people generally think of bake sales and the like. There are many other options for organizations to raise money.

**Online fundraising** - As mentioned this new method of raising funds increases your reach to potential donors. You can use online fundraising to collect donations, sell products, or hold an online auction. Magazine fundraisers can now be online too. It is free to the organization hosting it and is great for raising awareness on your cause. You can offer popular magazines at highly discounted prices. This can be a great marketing opportunity for you.

**Online Auctions** - Your organization could consider hosting an online auction. It can be quite easy to set up and user friendly for others to participate in. Think of it like using eBay. You can pair up the auction with another fundraising event. For more ideas check out: onlineauction.com, webidz.com, and ubid.com.
**Cause-related marketing** - As mentioned in cause-related marketing above, you can sell products for larger companies and get a cut of the profit. This might include candy, wrapping paper, popcorn, wreaths, or other gifts. Do some research on the companies first, as some will take advantage of nonprofits. They will not give you a decent cut of the profit. Ask other nonprofits who they have paired up with in the past, chose a product you think you can sell, and carefully look into the percentage package.15

**Scratchcards** - This may work for some organizations. You can place your company’s logo on scratchcards which have dots to "scratch" off revealing the amount of money the participant will donate. In return donors will receive coupons to popular US retailers such as AMC Theatres in return.15

**T-shirts** - A more traditional method of fundraising is the sale of t-shirts. This is another great way to market your organization and get your name around. You can wear them to community events, around town, etc. Sell them at your events, local sporting events, and other events to raise awareness.15

**Fundraising works when...**

- You have a lot of volunteers or a large audience at hand. For example you can ask high school students to sell something such as raffle tickets. A large captive audience to sell to might be at a sporting event. Provide them with something they need and do not want to leave to get it (i.e. food).

- You have the space for the event, such as a garage sale. The space should be easily accessed (playground, school, auditorium, town hall).3

Marketing is important for getting your event out there, attracting people to come and participate in your event, and sell your product. Use signs, email notifications, and other forms of advertising. Draft emails with the intention of them being forwarded. Make sure to explain where the money will be going and what it will be helping.3

Be sure you can reasonably make a profit. Fundraising is not somewhere you want to lose money. Any money you put into the fundraising event must be gained back through money earned. Below are some concepts to understand.3

- **Upfront and fixed costs** - These refer to costs you will pay no matter how much you produce or sell. These items might include a hall or booth rental and basic supplies such as a sign, cash box, and other equipment.

- **Variable costs** - This is the amount of money each item will cost you to buy or make. If you are hosting a bake sale this would include the ingredients and anything used to wrap the items.
• Price - decide how much you will sell your product for. This must cover your variable costs with a cushion. Think about how much people will realistically pay for your product.

**Tips:**

- Develop and maintain good relationships with funders
- Recruit millennials for fundraising and volunteering, they are more likely to help and are good at spreading the word
- Establish a user friendly way for people to donate online
- Make sure everything is up and running especially at the end of the year and around holidays
- Use Facebook, Twitter, and Instagram to share and promote your organization/fundraising efforts
- Create checklists to keep your fundraising goals on track
- Say thank you to all donors to increase likelihood of repeating donations

*Have a motivated sales force* - Even with a high demand product, you must have a good salesman doing the job. This person might be washing cars, sitting at a booth or table, etc. For larger, very important, or ongoing events consider group training. Remember to cover how to approach buyers, how to pitch the cause you are working toward, the rules and best practices, what type of payment to accept, and how to provide receipts.

*Create an impact* - Your fundraising event should be visible in the community. You must create a lot of excitement about your events, especially something where a lot of time and money went into it. This might include a bike rally or a race. Anyone can participate, drawing a wide variety of community members in and learning about your organization. People that chose not to participate in such an event would still enjoy watching the event, drawing a crowd, and supporting family and friends that did participate.

*Utilize the internet* - When your target audience includes young people, be sure to use the internet as a form of fundraising and marketing. A website can create a communication space, as well as means for young people to express their creative side while getting involved in your organization. You could create a forum for sharing of their thoughts or host a contest to generate interest. A contest could be having participants create something using video, music, photography, posters, or written material. The topic would be somehow related to the work your organization is doing. The winner’s piece could be publicized on the website, presented and displayed at meetings, and even used in your programs and projects when appropriate. People are more likely to return to your website if they feel a connection to you and if they can express their ideas.
**Be creative** - When you design awareness campaigns, remember to be creative as they can also bring in money. Make it something catchy, something people can and will want to participant in, rather than just donating money. One unique idea might be to contact local artists to see if they would be interested in pairing up with your organization while promoting their art. You can hold art auctions where artists can sell their work and you get a cut of the profit. Another type of art event to consider is called 100 Prints. "100 artists donate a limited-edition print or artwork, and 100 tickets are sold. Throughout the night, tickets are drawn at random, and the holder whose number is called has one minute to select the print they want. Every ticket holder is guaranteed to leave with something, but the evening creates suspense as the number of remaining prints dwindles and donors try to snag their favorite pieces." Find out more information about this event at [http://www.openstudio.on.ca/100-prints-2014/](http://www.openstudio.on.ca/100-prints-2014/).

**Harness talent** - Consider the talents of current organization members. What types of fundraising events would they do best with? Do you have good writers on board, organizers, athletes, artists, trivia whizzes, chefs? Use the talent you have from people into your organization to create worthwhile fundraising events.17

**Grants:**

*National/international government grants* - Federal agencies have a certain about of money they spend on grants per year. Although the process of applying can be time consuming at times, it can be well worth it if your organization qualifies. Do some research to see what types are available and which best suit the work your organization is doing. This type of funding will not be permanent and renewed every year like corporate sponsorship might be, however it can provide your organization the opportunity to do work you might not otherwise have the chance to do. When you produce positive results from the grant, you may be able to win it again in future years. State and local grants are also available which can help fund your organization’s programs and projects. Check out [www.grants.gov](http://www.grants.gov) for more information on and to view a directory of federal grants.17

The main issue surrounding government grants, is that they are not definite. You can put a lot of time and effort into applying for one, and may not get the grant. If you do get one great, just do not put all your eggs in one basket.

Find more information on applying to grants at: [http://managementhelp.org/nonprofitfundraising/#anchor96342](http://managementhelp.org/nonprofitfundraising/#anchor96342)

To see if your organization is ready for fundraising visit: [https://www.snpo.org/funding/rateyourself.php](https://www.snpo.org/funding/rateyourself.php)
Managing money:

Importance of accounting:

Accounting is a way for your organization to access money being spent versus funds coming in. You can track cash flow, raise money for projects, and budget for purchasing necessary equipment and supplies. You will find applying for grants to be easier when sound money management practices are in place. Accounting efforts should result in reports showing your monetary transactions and net worth. This is important to sponsors and important for your organization to be aware of. In this section basic accounting information and budgeting tips will be provided.\textsuperscript{18,19}

Although necessary, there are many things you would rather spend time doing as an organization than dealing with financial issues. When funds are available, you can consider hiring an accountant to handle your money for you. If this is not an option, there are internal ways to handle money and budgets. Use the skills of your treasurer and recruit other members of the organization interested in helping with accounting. There is also accounting software available which can help get you started properly dealing with money.\textsuperscript{18,19} The following site can act as an additional resource providing ample information on all things accounting for non-profits.  
http://www.nonprofitaccountingbasics.org/

Nonprofit accounting basics:

Terms to understand:

- **Assets:** "is an economic resource. Anything tangible or intangible that is capable of being owned or controlled to produce value and that is held to have positive economic value is considered an asset."\textsuperscript{20}
  - **Net assets:** "Total assets minus total liabilities of an individual or company."
    This includes unrestricted, temporarily restricted, and permanently restricted net assets. These three types of net assets are based on restrictions imposed by donors contributing funds.\textsuperscript{20}

- **Balance Sheet:** "records the monetary value of the assets owned by the firm. It is money and other valuables belonging to an individual or business."\textsuperscript{20}

- **Expenses:** "an outflow of cash or other valuable assets from a person or company to another person or company."\textsuperscript{21}
- **Liabilities:** "an obligation of an entity arising from past transactions or events, the settlement of which may result in the transfer or use of assets, provision of services or other yielding of economic benefits in the future."\(^{21}\)
- **Revenues:** "income that a company receives from its normal business activities, usually from the sale of goods and services to customers."\(^{22}\)

**Information on assets:**

Capitalizing and depreciating fixed assets - This process involves recording the purchasing of "long-lasting, substantial property and equipment (such as computers, vans, buildings, etc.) as assets in the financial records, and to charge a portion of the cost of those items in each year in which they have a useful life."\(^{19}\)

**Information on expenses:**

Expenses are reported according to what they support; either program expenses or supporting services expense. Program expenses are anything "directly incurred" by the organization through its programs. Your organization should list each program you have and any expenses resulting from each of them. On the other hand supporting services expenses can be classified as management/general, membership development, or fundraising. If you are paying members (such as board members), their salary would be an example of management expenses.\(^{19}\)

**Information on revenues:**

On your statement of activities (defined below) listed revenues might include any of the following: contributions, membership dues, program fees, fundraising events, grants, investment income, or gain on sale of investments. Nonprofits are unique in that they receive funds which are tax deductible to donors. There are specific accounting procedures to handle pledges, donated materials and services, and special events and membership dues.\(^{19}\)

**Financial Statements:**

Because nonprofits function differently than for-profit organizations, the financial statements will be different. Reference the table below to see the difference.
Statement of financial position (balance sheet):

This statement shows all organizational assets, liabilities, and net assets. The assets are generally aligned in the order in which they will turn to cash, and the liabilities when they need to be paid. Although more advanced than your organization will most likely need, the following chart provides examples of what each categories entails.23
Statement of activities (income statement):

Even though your organization is a nonprofit, you can still legally earn a profit. In order for the organization to be sustainable and accomplish its goal, profit must be made. Your revenue should and must exceed expenses. This is necessary in order to handle "unexpected expenses, uneven flows of revenues, a decrease in revenues, rising costs due to inflation, an increase in staffing needs, an increase in the need for its services, a purchase or replacement of needed equipment, and other needs since a nonprofit cannot issue shares of stock." Your statement of activities will report revenue coming in and expenses going out according to the three net asset classifications; unrestricted, temporarily restricted, and permanently restricted. The table below is a blank example of such a statement.

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
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<tbody>
<tr>
<td>Revenues¹</td>
<td></td>
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<tr>
<td>Expenses</td>
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<td>= Change in net assets</td>
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<tr>
<td>+ Net assets - beginning</td>
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<tr>
<td>= Net assets - ending</td>
<td></td>
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</tbody>
</table>

Statement of Functional Expenses:

This statement reports expenses by their function, i.e. programs, management and general, fundraising. It also tracks them by type of expense, i.e. salaries, rent, etc. The table below presents an example statement with the columns representing different functions and the rows types of expenses. This type of statement is not mandatory for nonprofits to complete, however is recommended for internal use. Accounting software is helpful in creating statements such as these.
Statement of Cash Flows:

This statement reports changes in cash and cash equivalents throughout an accounting period. There are three sections within this statement: net cash from operating activities, investing activities, and financing activities.

- Operating activities - This piece lists cash changes other than those already reported in the investing and financing sections.
- Investing activities - This portion includes money spent on long-term asset purchasing. This might include equipment, vehicles, and long-term investments. If you sell any long-term assets, the profit should be included in the investing portion as well. Depending on the size of your organization, you may or may not have these types of assets.
- Financing activities - The third portion consists of money received from borrowings and money from repayments.

Notes to the financial statements:
The last type of accounting statement you should consider compiling are "notes to the financial statements." These notes can provide additional information on the nature of your organization's activities and a summary of your significant accounting policies. The notes compliment information compiled in the previous financial statements (the statement of financial position, the statement of activities, and the statement of cash flows).

Budgeting for Nonprofits:

Creating a budget for a nonprofit can be daunting at first as funding comes from many sources and may not be secure when the budget is being formed. Your budget will be the best estimate for the course of the year, and should be modified as time goes on. Certain
accounting software enables the budget to be easily adjusted based on actual money coming in. There are certain expenses your organization will have every year and can more easily be included in the budget. This includes fees for meeting spaces, salaries for board members (if applicable), and basic supplies (notepads, pens, etc.). Other expenses cannot be foreseen, but extra money can be budgeted in to account for this. You may use more or less money than budgeted for these unforeseen expenses. It is wise to add in some wiggle room by setting extra money aside, as things generally cost more than expected. The following steps can assist you in the budget creating process.

1. Write it down - Any steps you generally take in creating a budget should be written down for both future use and to provide a checklist to measure your progress.

2. Decide who will be involved and when - Heads of the organization should have a role in budget creation, as should those who have to adhere to the final budget. You can gain useful insight into problems the current budget has and other issues those working directly with the community might have noticed.

3. Establish an annual timeline - Decide on a time when you will begin budget creation each year. Aim to have it completed two months before the start of the next fiscal year. Make sure you give yourself ample time to complete it.

4. Create a task list - Once you have your timeline established, you can create a list of tasks needing to be completed. A task might be to have someone research the cost and best budgeting software. Assign specific tasks to specific people working on the budget.

5. Remember to think "what-if" - Encourage your budget team to think of all possible "what-if" scenarios. The more safety nets you can incorporate into your budget, the less likely you will be to run out of money.

Paying your board members:

Legally nonprofits can pay board members, however most organizations recruit members as volunteers. Financially it may be difficult for organizations to compensate board members for their time. Some states do have restrictions on compensation for board service, which you would need to look into if money allows. If compensating board members, also keep the public's perspective in mind. Board members should not be personally benefiting from their relationship with the organization, however they should not be suffering financially due to their service either.

Accounting software:

ACCOUNTS - "ACCOUNTS is Windows software designed specifically for small nonprofit organizations in the U.S. and Canada with a smaller set of features to keep things simple. The software offers basic bookkeeping and easy, automated fund accounting that does not
require journal entries to keep an accurate balance. ACCOUNTS has a very generous 60 day free trial and support resources in the software itself, online, and via email or phone.

If you're currently using QuickBooks, Quicken or Simply Accounting / Sage 50 Canadian Edition, your chart of accounts can be imported (but transactions can't). New nonprofits can create their own chart of accounts or choose from one of many samples, which have links to for T3010, 990 or 990 EZ. The single user version of ACCOUNTS can be used on multiple computers, but the database will have to be copied between computers. The network version supports up to five users on a local area network or using the Internet, with simultaneous access to the database."24

Aplos - "Aplos is online accounting software specifically designed for churches and non-profits, and it is customizable so it can be set up to meet your organization’s financial needs. They have been in business since 2008, and are a great option for small nonprofit organization accounting. Buy the base accounting software then add on modules like Contributions Management, People Database, Budgeting, Bank Reconciliation and Check Printing."24

GnuCash - "This free program is double entry accounting software that’s great for small business, but that can only work for very small nonprofit organizations that don’t mind importing some numbers into Excel to get the proper reports due to the lack of any nonprofit plug-ins or add-ons."24

Microsoft Excel (Big E-Z) - "Big E-Z is not stand alone accounting software it is a spreadsheet template designed to be used with Microsoft Excel. It doesn’t require double entry accounting and is updated every year to include the latest IRS tax regulations. The template files consist of 12 monthly files with customizable income and expense columns.

Big E-Z is a possible accounting solution for very small non-profit organizations with a bookkeeper who is familiar with Excel. Big E-Z can only be used on one computer. While the template does not require any Excel programming, having an understanding of how Excel works will make using Big E-Z truly easy. The template package can be downloaded immediately after purchase online."24

Zoho Books - "Zoho is an online office suite with easy-to-use tools that all work together. The business applications include accounting software Zoho Books, a CRM app which can be used for tracking donors and that integrates with email, a human resources module that’s free for up to 10 employees, among others. Some perks that Zoho Books authors for nonprofits are multiple currency support, support for bank and credit card accounts, data sharing with an accountant and the ability to receive online payments. Zoho Books can be used by two users with additional user support for $5 a month."24

Find more details on these programs and others at: http://financialsoft.about.com/od/smallbusiness/tp/Low-Cost-Non-Profit-Accounting-Software.htm
Accounting resources for nonprofits:

- [http://www.nonprofitaccountingbasics.org/](http://www.nonprofitaccountingbasics.org/)

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11. Fast, J. The marketing donut - eight ways to get a sponsorship deal off the ground. Retrieved from [http://www.marketingdonut.co.uk/marketing/advertising/sponsorship/eight-ways-to-get-a-sponsorship-deal-off-the-ground](http://www.marketingdonut.co.uk/marketing/advertising/sponsorship/eight-ways-to-get-a-sponsorship-deal-off-the-ground)


Chapter 11: Collaboration

Collaborative partnerships:

Collaborative partnerships can be thought of as alliances used to improve the health of a community.

Key Partners in a broad collaboration should include:

- State and community partnerships
- Support organizations
- Grant-makers and government agencies

Reach out to them for support, suggestions, and possible partnership when tackling large issues.

When working with other organizations consider the following points:

- Contact the organization before a problem arises. You can have an issue in mind that you wish to work together on, but it is best to make contact before that issue becomes a full-blown problem. For example you can persuade an organization to work with you on community health goals by giving ample reasons why the creation of a more active, healthy and smoke-free community would benefit the whole neighborhood.

- Have appropriate key message points to give the organization in addition to a realistic plan pulling specific community resources together to accomplish goals.

- Always keep an eye out for new opportunities, both for programs and for possible partnerships. If you see an issue arise, contact the organization dealing with the problem or the neighborhood most affected by it. Offer a helping hand. In the case of working with a neighborhood, you may need to find a leader within to take charge and continue the project/program once your organization leaves.

While partnering up with any organization, translate how your interests complement their issues. Show how a partnership will be beneficial to both sides and what resources you bring to the table. Ask what do you have that they need? Be sure not to overextend your organization by trying to partner with too many others. Your organization’s goals should remain the top priority.
Working with elected officials:

The groundwork:

*Understanding Political Science* - Although seemingly daunting at first, working with elected officials in your community is actually quite easy. You must understand some political basics, but once you grasp them you will be amazed by what you can accomplish. Remember politics is all about relationships, understanding how to work with people, and how decisions get made. The definition of politics is, "the total complex of relations between people living in society."¹

**Who makes decisions?** Put time into researching who the decision-makers are in your community. Different community issues warrant authority from different people. For example the person in charge of parks and recreation is not the same person in charge of local schools or blight issues. Check out your town’s website, call city hall, or just ask around. Create a list of elected officials with their contact information for future reference. Focus your efforts on areas of interest to the organization. It might be helpful to look into individual officials' voting records to understand your politicians’ stance on the issues. "To convince decision-makers of what’s important to you, you must also understand and know what is important to them."¹

**When are decisions made?** Start attending board and committee meetings. Observing officials and the few community members in attendance will give you a good sense of what is being worked on, what people are concerned about, and how decisions are made. This will give you an edge on choosing issues people are concerned with, and issues elected officials would be more likely to vote favorably on. Knowing the political climate is crucial. For the majority of community residents, you can become their voice since they will most likely not attend these meetings.¹

The worksheets provided in the "Assessing Community Needs" section of this binder will be helpful to use here as well. They were designed to help gather data and information on decision-makers in the community.

**Advocacy:**

It can be defined as, "educating decision-makers (elected, appointed, staff persons) about a cause or issue, without making any direct reference to a specific piece of legislation or legislative proposal."¹ There are thought to be four different models of advocacy, which are
described below. Consider all of them in your work, however choose the one most suited to your efforts. The relationship-based model can be particularly important when dealing with elected officials.¹

Models of advocacy:

- **Information-based advocacy** - This model is ideal for noncontroversial issues by working to persuade officials to act in a certain way through presentation of information on a topic. You must frame the issue correctly to avoid controversy. This method is good to use along with the other methods listed below.¹

- **Coalition-based advocacy** - Here diverse individuals work together to advocate for tough issues. You are informing decision-makers of pressing issues and what they can do about them. Health, whether it be physical, mental, or environmental, is something officials enjoy putting on their agendas. This method can be very powerful and fruitful.¹

- **Relationship-based advocacy** - This method revolves around forming relationships with elected officials and continually maintaining them over time. Once you have succeeded in capturing the attention, vote, and even community change you had hoped for, you must retain the relationships you have formed. Alternatively when a new official is voted in, elected to a new board, or even just running for office, you should grab the opportunity to form a relationship with them. Let them know what your main issues are and how serious you are about them. Newly elected officials often look for issues to take a stand on. Why can’t it be yours? You can become their resource providing them information and be their connection to the community.¹

- **Power-based advocacy** - "This form of advocacy is based on the perception of political power and fear of retribution at the ballot box." This involves letter-writing, rallies, and other actions to attract media attention. It slowly builds pressure on decision-makers who are undecided on the issue. It can be confrontational and will only be effective if "a strong and diverse coalition exists, grassroots are meticulously organized, information is appropriately utilized, and relationships exist to back it up."¹

Advocacy can take on many forms. If the issue is not perceived as controversial, information-based advocacy alone is usually successful. Advocating for a healthy community is likely to have conflicting elements and will need a creative approach utilizing
more than one model. Ultimately the model you choose will depend on the issue at hand and may require use of a combination of models.

City Council:

Meet the Council:

"The NOLA City Council is the legislative branch of New Orleans City government. The Council considers and enacts all local laws that govern the City of New Orleans. They approve the operating and capital budgets for the City, as recommended by the mayor, and continually monitor revenues and expenditures for local government operations. The City Council is also the regulatory body for public utilities. It reviews and has final say on many land use and zoning matters, as well as considers major economic development projects for the City. As a Board of Review for Orleans Parish, the Council examines appeals of property tax assessments for real estate taxes, and certifies tax rolls to the Louisiana Tax Commission. Other responsibilities of the Council include overseeing the operation of the public access television in Orleans Parish."

There are five districts within the City Council and two council members-at-large. To find a listing of current council members visit http://www.nolacitycouncil.com/meet/meet.asp. There you can also find information on different committees and staff members. If council members are difficult to contact, their staff can become a very helpful resource to you.

A Public Guide to the New Orleans City Council

Attached at the end of this section is a guide to help you better understand the city council, how it operates, what authority it has, and provide you with guidance on how to work with its members.
New Orleans Police Department (NOPD):

The Office of the Independent Police Monitor:

Mission and responsibilities

Mission: "The Office of the Independent Police Monitor (IPM) is an independent, civilian police oversight agency. Its mission is to improve police service to the community, citizen trust in NOPD, and officer safety and working conditions." One of their responsibilities is "to reach out to inform the community about the complaint process and IPM activities, and to listen and respond to broader community concerns." IPM can therefore be a resource for your community organization.

Vision: "By working with the police and the community we cannot only reduce violence but we can create real communities - all of us sharing in this city by living according to the rules of mutual accountability and respect. The community we are helping build will be safe for everyone, regardless of race or socioeconomic status."

Responsibilities: IPM has numerous responsibilities. Below are ones most relevant to community organizations.

- "Civilian Complaints - Civilian complainants who have tried unsuccessfully to obtain a meaningful status report on a complaint they initiated, may, upon request, receive such a status report from the independent police monitor. Civilian complainants who are dissatisfied with the outcome of an investigation they initiated may request a review by the independent police monitor of the completed New Orleans Police Department investigation. When he deems it appropriate, the independent police monitor may recommend that such an investigation be reopened and report to the complainant whether he has recommended any further investigation. The reopening-of-case recommendation provision only applies to the very limited instance where the statutory time limit permits."

- "Recommendations to police superintendent - The independent police monitor shall evaluate complaint trends and other information and investigation practices. The Independent police monitor shall make recommendations to the superintendent to improve upon policies and practices based on national best practices."

- "Training review - The independent police monitor shall periodically review training sessions and schedules to identify best practices and any need for improvements to training curriculum or frequency."
"Public Accountability - The independent police monitor shall distribute information about its office, duties, and functions. The independent police monitor shall issue complaint and commendation forms in languages and formats accessible to residents. The independent police monitor shall be required to hold at least one public outreach meeting in each council district of the city at least once every four months. The independent police monitor shall be required to meet with each police association a minimum of three times each year."4

Quality of Life Officers and Community Coordinators:

Every district in New Orleans is covered by Quality of Life (QOL) Officers and Community Affairs Coordinators (CoCo).

Duties of QOL Officers include:

- Attending neighborhood meetings and informing the public on QOL issues
- Informing the public about crime prevention methods
- Patrolling for abandoned vehicles
- Patrolling for people littering
- Providing code enforcement locations of abandoned or structurally unfit residencies.
- Assisting in code enforcement with health and environmental issues such as locations that contain high levels of grass and weeds or illegal dumping of oil within the district.
- Starting and conducting Neighborhood Watch meetings
Assisting with monthly New Orleans Neighbors and Police Anti-Crime Council (NONPACC) meetings
Assisting non-city agencies (i.e. Louisiana State Health Department, boy scouts)
Assisting the City Attorney’s Office with enforcement of ABO laws and decrees

As you can see these officers have their hands in many different areas of the community. Your specific organization goals may very well coincide with efforts they are already making. Consider reaching out to an officer and see what kind of partnership you can form. How can your organization be of use to the officer and how can the officer assist in moving your mission forward?

Find out who the current QOL officers are and how to reach them at:

References:


A PUBLIC GUIDE TO THE NEW ORLEANS CITY COUNCIL

SOURCE:
Office of the City Council, Chief of Staff
Room 1E06 - City Hall
New Orleans, LA 70112
www.NOLACityCouncil.com
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1. **FUNCTIONS OF THE COUNCIL.**

The structure of the City Government of New Orleans is set forth in the Home Rule Charter. The Charter provides for a Mayor-Council form of government. Section 3-101 of the Home Rule Charter provides that “all legislative powers of the City shall be vested in the Council...”. *Black’s Law Dictionary* defines the “legislative department” as “that department of government whose appropriate function is the making or enactment of laws, as distinguished from the Judicial Department, which interprets and applies the laws, and the Executive Department, which carries them into execution and effect.”

**A. Enactment of laws pursuant to the police power.**

1. A primary function of local legislative bodies be–it the Congress, the Legislature, or the City Council–is the enactment of laws to protect the public health, safety and welfare under what is legally called the “police power”. The Council adopts ordinances of general application pursuant to the police power. Such ordinances include:

   a. Minimum Housing Standards Code
   
   b. Traffic and Parking Regulations
   
   c. Health and Sanitation Regulations
   
   d. Prohibition on Certain Types of Conduct (Criminal Ordinances)
   
   e. Land Use

2. Ordinances of general application are required by the City Charter to be codified (placed in the City Code or other code such as Fire Code, Building Code, or Comprehensive Zoning Ordinance) (*HRC Section 3-114*). It is important to note that the Executive Branch (Mayor) plays an important role in the enactment of ordinances. On the one hand, the Mayor or Executive Branch may propose ordinances or make recommendations to the Council regarding legislation. Further, the Mayor is given veto power over ordinances and a 2/3 vote of the Council is necessary to override a Mayoral veto (*HRC Section 3-113*).
B. The City Budget.

1. Legislative bodies are said to possess “the power of the purse strings” in that appropriations for the operations of government are made by the Legislative body and the power to enact laws to raise revenues is vested in the Legislative body.

2. The Charter requires the Administration to prepare operating and capital budgets for the ensuing year and to submit them to the Council not later than the first day of November of each year (HRC Sections 6-102 and 6-104). The Council holds public hearings on the proposed operating and capital budgets. The Council may modify the proposed budgets and is required to approve the budgets by ordinance (HRC Section 3-115 and 3-117). Capital budget money is used for public buildings, streets, etc. Operating budget money is used to pay salaries and buy equipment and supplies (HRC Section 6-103 and 6-105).

3. Under the City Charter, the Council has broad authority to levy taxes. Nonetheless, the State Constitution imposes severe restrictions on the ability of local governments to raise revenue. For example, local governments may not levy an income tax or a gasoline tax. Increased sales taxes require approval of the voters.

4. The Council has responsibilities regarding the salaries paid to City employees. For classified Civil Service workers, Article 10, Section 9 (c) of the State Constitution requires that any rule or determination of the Civil Service Commission affecting wages or hours must be approved by the City Council. The Council must approve pay plans for both classified and unclassified City employees (HRC Section 3-118). Classified employees usually are required to take tests to get jobs or promotions. Unclassified employees are appointed directly by elected officials.

5. Ad valorem property taxes are an important source of revenue for units of local government. The City Council acts as a Board of Review for property tax assessments to ensure fairness and equity. A property owner may appeal the assessment made by the Assessor to the Council. The Council normally meets as Board of Review in late August and early September of each year. A further appeal of property tax assessments may be made to the Louisiana Tax Commission and, finally, the courts.

6. There are certain constitutional provisions, laws, and ordinances which require Council approval of actions by other Boards and Commissions. For example, the Council must approve certain contracts of the Sewerage and Water Board and Aviation Board. Plans, and budgets of agencies such as the Downtown Development District, New Orleans Business and Industrial District and the Regional Transit Authority (RTA) are subject to Council approval.
C. Land use and Zoning.

1. Throughout the United States, Councils play an extremely important role in land use and zoning matters and, indeed, it is one of the most important functions of the New Orleans City Council.

2. The Council depends on and works closely with the City Planning Commission in connection with zoning and land use matters.

3. There are three (3) types of zoning ordinances routinely adopted by the City Council:
   a. Map changes (changes to zoning of a parcel of property).
   b. Text changes (changes to the text of the CZO).
   c. Conditional use (approval for a particular use subject to specific conditions).

4. a. Each parcel of property in the City is classified as being in a specific zone on the official zoning map. Property may only be used for purposes allowed in the respective zoning district. For instance, property in an RS-1 zoning district is generally restricted to single family housing. Property zoned “HI” (Heavy Industrial) may be used for factories, warehouses, and similar functions.

   b. The Zoning Ordinance also establishes minimum requirements for things such as open space (yard area) and parking, and establishes maximums for things such as height and density.

5. With the adoption of the amendment to the Home Rule Charter in 2008, the Council is limited in adoption of zoning changes to those that are consistent with the Master Plan (HRC Section 5-404).

6. Through interim zoning measures such as moratoriums and through other land use control measures, the Council may temporarily prohibit demolitions or the establishment of different types of uses in areas of the City.

7. The Council, through the establishment of historic districts, also regulates the aesthetic characteristics of property in the City as well as the use of the property.
D. Investigations.

1. Typically, legislative bodies are given authority to conduct investigations. This is a function of the New Orleans City Council and forms an important part of the system of checks and balances provided for in the City Charter.

2. Actually, the Council routinely “investigates” matters as it conducts public hearings and asks questions of executive branch officials at City Council meetings. Section 3-124 of the Home Rule Charter gives the Council specific authority to investigate the operation of any official, department, or board, any matter upon which it may legislate, or, subject to limitations, any entity that receives funds from the City. Importantly, the Council is given the power to administer oaths, subpoena witnesses, and compel the production of books and papers. The Council is also authorized by Section 4-403 of the Charter to employ special counsel to assist it in the conduct of investigations or for other matters.

E. Utility regulation.

1. The New Orleans City Council is unique in that it is responsible for the regulation of electric and gas utilities within the City. Few cities in the United States have such regulatory authority over electricity and gas. Normally, state Public Service Commissions are responsible for such regulation (HRC Section 3-130).

2. The Council also regulates Cox Cable.

3. A third area of public utility regulation under the jurisdiction of the Council is the regulation of taxi cabs, limousines, and other for-hire vehicles (HRC Section 3-131).

F. Boards and Commissions.

1. In general, under the Charter, the Mayor makes appointments to most boards and commissions. However, the Council, as a check and balance, must approve the appointment of persons nominated to boards and commissions by the Mayor (HRC Section 4-206 (1) (e)).

2. The Council makes appointments to some boards and commissions, notably the Civil Service Commission (HRC Section 8-103), the Home Mortgage Authority and the Alcoholic Beverage Control Board (HRC Section 5-901).

3. By virtue of their office, some Council members serve ex-officio on different boards and commissions. Councilmembers-at-Large for example, serve on the Sewerage and Water Board (HRC Section 5-301) and the Regional Planning Commission. The Council also makes appointments of Councilmembers to the City Park Board, French Market Corporation, etc.
G. Advocacy.

In addition to making laws, Councilmembers are in fact the closest of all elected officials to the citizens. The Council’s official business is conducted within the City of New Orleans as opposed to Baton Rouge or Washington, D.C. Councilmembers consequently are accessible to the citizenry and act as advocates in City Government and in other agencies of government on the behalf of citizens. By virtue of their office, Councilmembers can influence matters in the community and the private sector and through speeches, policy statements, and meetings within the community exert moral suasion and help shape decisions throughout the community.

2. STRUCTURE.

A. Composition.

The Charter provides for seven Councilmembers, two elected at-large and five from districts of approximately equal population. The Council must redistrict the Council districts after each decennial federal census (HRC Section 3-102 and 3-103).

B. Compensation.

Each member of the Council receives the same amount of pay. The salary for the Councilmembers was set at $83,507 per annum (Ordinance Number 23749 M.C.S.), effective for May 2010. Each succeeding first Monday in May, on an annual basis, each councilmember shall receive a cost of living adjustment according to the rate of inflation defined by the Federal Bureau of Labor Statistics.

C. Organization.

One of the Councilmembers-at-Large is elected by the Council as President and the other Councilmember-at-Large is elected by the Council as Vice President. In practice, the presidency and vice-presidency rotate between the two Councilmembers-at-large annually. This is part of the Council rules (HRC Section 3-107 and Council Rule 8).
D. Staffing.

The Council is assisted by a combination of personal staff members responsible to each individual Councilmember and central staff units responsible to the Council as a whole. The central staff units, headed by the Council Chief of Staff, are as follows:

1. Clerk of Council
2. Fiscal Office
3. Utilities Regulatory Office
4. Research Staff

E. Assistance from Executive Branch.

In addition to those on staff, the Council receives assistance from various departments of the Executive Branch. The City Attorney and the Department of Law provide legal advice to the Council. The Chief Administrative Officer and the department heads of City Government give the Council advice on the budget and on matters under their jurisdiction.

3. PROCEDURES.

A. Requirements of State Law.

A number of matters affecting procedures which the Council must follow are mandated by the State Constitution or State laws. Some important examples include:

1. Open Meetings Law.
   With few exceptions, meetings of the Council and its committees must be open to the public. This is popularly called the Sunshine Law (L.R.S. 42:4.11 et seq). Executive sessions may be called for the purpose of discussing limited subjects such as pending or threatened litigation, discussion of character, professional competence or physical or mental health of a person,
report or development of security plans, personnel or devices, and investigations of alleged misconduct.

   Official documents of the Council, reports and memos, as well as e-mails, are subject to the provisions of the State Public Records Act and are generally available for public inspection and copying. Exceptions would include privileged communications in connection with litigation, for example (L.R.S. 44:1 et seq). This applies to Councilmembers, their staffs, and central staff. Such records must be kept a minimum of three years or in accordance with a Records Retention Plan approved by the Louisiana Secretary of State.

3. State and City Ethics Codes.
   Members of the Council are required to follow the provisions of the State and City Ethics Codes to prevent conflicts of interest or acceptance of things of value for service as public officials (L.R.S. 42:1101 et seq and City Code Section 2-716).

   The Charter itself sets forth many important procedural requirements for the conduct of the Council’s business. Some of the more important requirements are listed below:

1. Regular meetings.
   The Council’s Rules must provide for regular semi-monthly meetings throughout the year (HRC Section 3-107(5)).

2. Laws adopted by the Council must be by ordinance (Home Rule Charter Section 3-111).

3. All ordinances when introduced must be complete and in writing and may not be amended so as to nullify the original purpose (HRC Section 3-112 (1)).

4. Except in extreme circumstances, ordinances must lie over for at least six days prior to adoption. Some ordinances must lie over at least 20 days before adoption because of their important subject matter (see IV A.1.d below) (HRC 3-112(4)).

   The provisions of State Law and the City Charter are supplemented by the Council’s own rules. In general, the rules provide for parliamentary procedures observed by the Council and other
matters such as time limits on speakers, frequency of meetings, and organization of committees, etc.

4. LEGISLATIVE INSTRUMENTS USED BY THE COUNCIL.

A. Purpose.

The purpose of this section is to give a brief summary of the official legislative instruments used by the City Council. The Council’s official acts include the following:

1. Ordinances.
   In general, acts of the Council that are laws are adopted by ordinances. Ordinances are subject to advertising and lie-over requirements and are subject to veto by the Mayor. At least five votes are necessary to pass an ordinance that has been vetoed.

   a. Local Laws.
      Ordinances are our local laws. The Council adopts these as “the local governing authority” of the City of New Orleans. The Mayor is required by the City charter to “see that... the ordinances of the City, and all laws are enforced.” The Charter sets forth requirements for ordinances (HRC 3-112).

   b. Subject Matter of Ordinances.
      The following are examples of things that the Council accomplishes by passing ordinances:

      • Certain actions are made unlawful.
      • The City operating budget is adopted or amended.
      • A street is dedicated (or undedicated).
      • A franchise for use of City streets is awarded.
      • A requirement for a permit in order to do something is established.
      • Required compliance standards are established.
      • A tax is levied.
      • A service charge is imposed.
      • An area is designated as an historic district.
      • A procedure to be followed by the City Administration is specified.
      • A temporary moratorium is established.
• The unclassified pay plan is amended.
• The zoning of property is changed.
• City property is authorized to be sold.

c. Introduction of Ordinances.
Only a Councilmember may introduce an ordinance. When introduced, ordinances must be complete and in writing (HRC Section 3-112(1)).

Except for codifications and the annual operating and capital budgets, ordinances must embrace only one object. For example, one ordinance can’t raise the Mayor’s salary and also prohibit alcoholic beverage outlets in Algiers.

After introduction, ordinances are distributed to the Mayor and Councilmembers and made available to the public.

d. Lie-over requirements.
Before an ordinance can be adopted, it must lie over for at least six days prior to adoption (HRC Section 3-112(4)).

Some ordinances must lie over for at least twenty days and can only be adopted at a “regular” (as opposed to “special”) Council meeting (HRC Section 3-112(5)). Those 20 day lie-over ordinances include ordinances that:

1. Levy or increase a tax.
2. Require a license or permit or establish or increase a service charge or permit fee.
3. Change zoning.
4. Alienate City real property or grant franchises.

These lie-over requirements can only be waived by unanimous vote of a quorum of the Council declaring the existence of an emergency due to act of God, riot, war, or a grave emergency which threatens widespread loss of life, or grievous injury to health or property (HRC Section 3-112(11)).

e. Amendment of Ordinances.
The City Charter prohibits amendments to ordinances that nullify the original purpose of the ordinance or accomplish an object not germane to its original purpose. For example, an ordinance to dedicate a street could not be amended to become an ordinance to raise Council salaries (HRC Section 3-112(3)).

f. Vote to Adopt an Ordinance.
At least four votes are required to adopt an ordinance. If two Councilmembers are absent,
an ordinance cannot be adopted by a three to two vote *(HRC Section 3-112(10)).*

g. Mayoral Approval or Veto.
Following adoption, an ordinance is delivered by the Clerk of Council to the Mayor. The Mayor can approve, veto, or take no action on an ordinance *(HRC Section 3-113).*

If the Mayor approves the ordinance, it becomes law upon its return to the Clerk of Council and becomes effective at noon the next day *(HRC Section 3-113(2)).*

If the Mayor takes no action, the Ordinance becomes law at noon on the tenth calendar day following its adoption and effective at noon the next day *(HRC 3-113(2)).*

If the Mayor vetoes the ordinance, the Mayor must return it to the clerk within ten calendar days of receipt. The Mayor must provide a written veto message *(HRC 3-113(2)).*

An ordinance that has been vetoed is reconsidered by the Council at one of its next two regular meetings. At least five votes are necessary to override a veto, even if one or more Councilmembers are absent *(HRC 3-113(3)).*

h. Important Exception.
The City Charter allows utility rate orders, such as Entergy rates, to be approved by ordinance or resolution. The Council has historically used the resolution format for utility rate orders *(HRC 3-130(6)).*

2. Motions.
Motions generally give approval or ratification to the act of another party or authorize some action by the executive branch.

a. During the course of a Council meeting, many verbal motions are made as part of parliamentary procedure, i.e. motions to defer a matter, suspend the rules, recess, etc. This report does not deal with such parliamentary matters but rather with the written document called a Motion that gives Council approval to certain things.

b. By custom, the council employs a written “Motion” to authorize or give its approval to various actions. The Motion format is used by the Council to approve or authorize things such as:

- Appointments to boards and commissions.
- Public hearings by the Planning Commission to consider a zoning matter.
- Amendments to the City Council’s Rules.
- Planning Commission recommendations on zoning petitions.
- Declarations of emergency for purposes of waiver of public bid laws.
- Operating budgets of agencies such as the French Market Corporation.
• Temporary alcoholic beverage licenses
• Amendments to the Civil Service pay plan for classified employees (HRC Section 8-110).

c. Motions are not generally subject to the lie-over requirements as are ordinances. Under the Council rules, some motions should lie-over (Rule 15). These include new appointments to boards and commissions. At least four votes are needed to adopt a motion under the Council Rules. A motion is not subject to a Mayoral veto. Motions to amend the council rules must be published at least one week before adoption, and thus will lie over (HRC Section 3-107(3)).

3. Resolutions.
Resolutions generally express the will or sentiment of the council or request some action.

a. By custom, a “Resolution” format has been used by the Council to express its opinion on a matter or to request action or information from some entity. Such resolutions may:

• Ask Congress to consider some Federal legislation.
• Request the Governor to take some action.
• Express condolences upon the death of an individual.
• Request action or a study by the City Administration.

b. Resolutions are not subject to lie-over requirements or veto. As with ordinances and motions, at least four votes are necessary to pass a resolution.

c. There are important exceptions to the above discussion of Resolutions. They are:

(1) Under the City Charter, utility rates and orders may be made by “ordinance or resolution” (HRC 3-130(6)). Historically, the Council has employed the Resolution format in utility rate matters. Therefore, the Mayor’s approval has not been required as it would be if the ordinance format were used.

(2) Sometimes, the Congress or the Legislature will pass laws that require some form of local approval by a city council, town council, etc. The Congress or the Legislature may require such local approval by “Resolution”. In such cases, the New Orleans
City Council may follow the terminology used in the Federal or State legislation and use a “Resolution” format for something that the Council would normally approve by “Motion”.

4. Other Comments.
   a. Introduction of Legislation “By Request”.
      Sometimes, the phrase “By Request” appears following the name of the author of an ordinance, motion, or resolution.

      By custom, the “By Request” designation indicates that the author has introduced the legislation as a courtesy and therefore may not support it when it comes to a vote.

      Typically, “By Request” means that the City Administration has requested introduction of a piece of legislation. However, the phrase may also be used when private parties have requested a Councilmember to introduce an ordinance, motion, or resolution.

   b. Codification.
      The City Charter (3-114) and the Louisiana Constitution (Article VI, Section10) require that ordinances of general application be “codified” or placed in a code book.

      The City of New Orleans has a number of “codes” including the City Code, Zoning Ordinance, Building Code, and Fire Prevention Code.

      The codification requirement doesn’t apply to ordinances that are not of general application such as an ordinance re-zoning a specific parcel or an ordinance amending the operating budget of the Department of Public Works.

   c. Index of Council legislation.
      The City Charter requires that the Clerk of Council maintain a comprehensive index of Council ordinances, motions, resolutions, and other official acts (HRC Section (3-107(7)).

   d. Advertisement Requirements.
      The Charter requires that all official acts of the Council including ordinances, motions, and resolutions be published in the City’s Official Journal, electronically, or in a register (HRC Section 3-113(5)).

   e. Agenda Deadline.
      The Council Rules contain an agenda deadline, currently at noon on the Monday before a Thursday Council meeting. If an ordinance on first reading, motion, or resolution does not make the written agenda, the Council’s Rules must be suspended by unanimous vote of those present in order to introduce or consider the item (Rule 17 and R.S. 42:7(A)).

   f. Proclamations.
Chapter 12: Website Design

Website design:

Why have a website?

Community organizations can benefit greatly from having a website. Below are some of the top reasons to have one.

1. Websites can be less expensive and much easier to create than you might think. Free website hosts are basic in nature and extremely user-friendly, making creation quick and painless. There are numerous free and low-cost hosting sites (discussed later in this section).

2. Potential funders and donors may look online to find out more information about your organization before making a commitment. Having a professional looking website may help you secure funding. Sponsors may wish to revisit your site to check your progress over time and see where their money is going.

3. Your target audience may look for you online. The internet serves as a major resource for finding a product, service, event, news, and more.

4. A website allows you to build public trust. The public can readily access your contact information, see work you are doing, and read important legal documents. It is recommended to display items such as "your IRS letter of determination, board of directors, annual report, and 990 forms."

5. It can be better for the environment as you can post documents online for people to download and save, rather than having to print hard copies.

6. Unlike your board members, a website is available to answer questions 24/7.

7. As an organization you can plan and focus your efforts through a website. You can internally track progress and see your efforts pan out.¹
Keys to starting a website:

The three main goals for creating a website are generally to spread awareness, inspire donation, and recruit volunteers.

What to include:

- "About us" section
  - This is for people to quickly understand what your organization is about and the work you are doing. Although it will be posted on your "contact us" page, it is recommended you add an organization email address and phone number on this page as well.
- Mission statement, vision, values, and goals/objectives
  - You can briefly share accomplishments here as well.
- Organization logos and symbols
- Photos
  - Post pictures of board members, the work you are doing, people you have helped
- Information on organization events
- Links to your social media sites
- Social media buttons
  - Such as the Facebook "share" button or the Facebook "like" button. "ShareThis" is an application that adds social media buttons to your site. Have the newsfeed from a social media site on a sidebar of your website’s homepage.
- Email sign-up option
- Donation button
  - The "Donate Now Button" is a simple and easy way for people to give you money online. "You can design a custom button and link it to a money collection service of your choice. PayPal is a great option as many people are already comfortable with using their services in other places on the web. PayPal has an easy-to-use Donate Now Button that can be linked to your
account and set up on your site in a matter of minutes." You can also include recent donation statistics.

- Options for community involvement and volunteering
- Space for the community
  - Readers need a place to connect with you and with one another, a place to share stories and experiences, to comment, and to provide feedback.
- Testimonial page
  - This page will be for both people you have helped and people with whom you have worked
- Organization contact information
- Copyright statement
  - "Everything you create on your site is owned by the site’s owner, but by not including a copyright statement on your page you make it easy for people to repost at will without citing their sources. If a person reposts your content with citation, it is another valuable link back to your website, which helps people find out more about you. Adding a copyright statement is as easy as adding “©2012 All rights reserved” as a footer to your site."
  - Add the name of your organization here as well.

Some of the above components can and should be used for blogs too.

**Engage viewers:**

Since your homepage is the first page that a viewer will see, make it eye catching and call them to action. Some options for your homepage are listed below.

1. Display an evoking image, a bold statement, or a short story about the need for your organization’s work.
2. Have a clearly organized layout. While designing your setup, consider the viewpoint of your target audience. What would make the most sense to them?
3. Express why your nonprofit is the nonprofit your viewers should support. What makes you special and different from all the rest?
4. Include testimonials from other people and other organizations. On the homepage these can be brief snippets and link to your testimonial page with all the rest.
5. Allow donors and potential donors to see where the money is going. State what percent of donations go directly to your mission.

**Free and low price website options:**
• **BlueGriffon**: This host provides straightforward design but also more powerful features compared to other sites. Simple tasks such as inserting text, images, tables, audio files, videos, etc. can be performed. Some aspects of the program do require additional add-ons. Overall BlueGriffon is easy to use.

• **HOA express**: This site caters specifically to neighborhood and community organizations. They provide free websites which allow you to add pages, send blast emails, create surveys for viewers, and more. Find out more information on the site below.

• **IM-Creator**: This creator is very simple and includes dozens of website templates that do not require much alteration before they are complete. They allow you to insert text, pictures, videos, and more. You will get suggested structure and pages from IM-Creator with the ability to change them if you wish. There is also a "support" tab you can use to get help from the IM-Creator team. They offer a free site or the option to upgrade for a price.

• **Moonfruit**: Through this site you can customize your website’s style and layout. You will not be required to understand computer code, HTML or CSS. The site you design will be optimized for both web and mobile use.

• **Neighborhood Link (Your Community Connection)**: Neighborhood link is a site that provides free websites to HOAs, neighborhood associations, and community organizations. You have the option to upgrade to a premium account. Find out more information at the site below.

• **PageBreeze**: Although it may not be up to the standards of professional web designers, PageBreeze allows you to create simple websites from free templates. You have the ability to add links, images, tables and forms. You can also easily edit pages you have created.

• **Webs**: Webs is a free website design site. You can choose from numerous design templates, add pages, and drag and drop elements onto your site.

• **Weebly**: A basic site on Weebly is free, however to upgrade to a premium account is only $4 per month. It is easy to use and highly customizable. These websites carry well across computers, mobile phones, and tablets.

• **WIX**: "Wix.com is a cloud-based web development platform that allows users to create HTML5 websites and mobile sites, through the use of their online drag and drop tools." It is extremely user friendly and allows quite a bit of customization to occur. You can add social plug-ins, eCommerce, contact forms, email marketing, and community forums. "Users must purchase premium packages in order to connect their sites to their own domains, remove Wix ads, add e-commerce capabilities, and buy extra data storage and bandwidth."
• **Yola:** This site is free to use and has no third-party advertisements. It is easy to design your website using the "Site Creation Wizard" and "Sitebuilder" to drag and drop elements. You can add photos, videos, maps, forms, and more. If you do not want to deal with designing the site yourself, Yola can do the layout for you. Once you become more familiar with Yola and web design in general through practice, you can edit images online, add HTML, Javascript, and site wide CSS.\(^\text{14}\)

Other resources:

• **Firebug:** This is a Firefox extension designed to help you "view HTML and CSS code, adjust your styles and see the results immediately, understand your page layouts, debug and log JavaScript, manage cookies, analyze page load times, examine error messages and more."\(^\text{15}\) Even though it sounds complicated, you can start off using it for only basic needs, advancing at your own pace. Find out more information at [http://getfirebug.com/](http://getfirebug.com/).\(^\text{15}\)

• **Open Source Web Design:** This site allows you to download free web design templates.\(^\text{16}\)

• **Orgspring:** This site allows you to apply for a free website as a nonprofit.\(^\text{17}\)

**Blogs:**

**Blog or website? How to choose:**

Before you create an account with a blog service, decide if blogging is appropriate for your organization. In some cases a blog may be useful in addition to a website, but in small organizations a blog might be preferred over a website.

Decide why your organization would want to blog in the first place. What purpose would it serve? What would you write about? You should set several goals you wish to accomplish through blogging. In order to gain the most benefit from blogging you must know what your intentions are and have a plan to achieve them.\(^\text{18}\)

**About blogs:**

You can allow people to subscribe to your blog, receiving an email every time you post something. They can also "follow" your blog. Gaining subscribers and followers is a way to expand the audience you are reaching. You want to be sure the information you post, and ultimately the time you are inputting is helpful to your target audience. While it is important to get your message across, you should also be mindful of how you present information and whether or not your audience will care.\(^\text{18}\)
Blogs allow community members to contribute and be a part of your organization. Pay attention to comments made by community members and what content they respond to best. Start with the following steps.

Steps to effective blogging:

1. **Identify the objective(s)** - As previously mentioned, it is important to create a plan for your blogging efforts with specific objectives in mind. Some possible objectives include organization branding, member engagement, recruitment, and revenue generation.

2. **Determine if a blog will work in your organization's environment** - You need to decide if your organization is ready to have a blog. Do you have someone willing to handle the blog? Is the rest of the organization comfortable with the idea of having a blog? Get their thoughts and input.

3. **Develop information architecture that is geared toward your objective** - "Information architecture is the process of structuring the content of your organization's blog in a way that makes it easy to find and well managed. This is a key reason for blogs being successful or failing."

4. **Don’t overlook the importance of aesthetics and branding** - Take the time to make your blog look aesthetically pleasing. It should be an online representation of what your organization stands for and the image you wish to put forward. Any logos or symbols you wish your audience to relate to your organization should be placed on your blog.

5. **Establish an Editor** - You must decide up front who will be in charge of maintaining the blog. This person will listen to organization members for input, decide what to post, how to post it, when to post it, and more. They must also respond to comments from viewers and make blog changes based on viewer activity. They have the responsibility of keeping the blog content on track and in line with the organization’s objectives.18

Choosing a blog platform:

Before you pick a blog host site (and several are described below), think about the following:

- What are your goals? What do you need your blog platform to be capable of doing? Make sure the one you chose has the features you need. Consider what you will be posting.

- What is your budget? You most likely will be able to get all the features you need from a free blogging site. If you see yourself requiring more features in the future,
choose a site with the option of upgrading. Things that cost money are the blog itself, hosting your own blog, and having a unique domain name. Some blog platforms offer all three for free.

- How savvy are your computer skills? If no one within your organization is knowledgeable about how blogs work, choose a basic site that does not require a lot of computer knowledge. You can learn as you go, but your site will look much more professional with a predesigned template.

There are two types of blog platforms; hosted and stand alone. For community organizations, a hosted platform will be sufficient. They are cheaper (if not free) and easier to set up and run.

Platform Options:

1. **Blogger**: Blogs from this site are free to set up and easy to use. They allow you to connect with your other social media sites and have free add-ons to include useful tools. You can easily edit and publish posts, add photos, videos, and more.

2. **Medium**: This site was developed by Twitter co-founders. It is free to use and is best for those whose main goal is to share stories. You do not have the ability to customize your site with Medium, which is great for anyone who would rather avoid having to figure out an appropriate design.

3. **Tumblr**: Although this site might not be good for organizations that want to post a lot of written text, if you are interested in posting pictures, quotes, links, music, and videos, this might be a good option. There are color and theme customization for your site. It is free to use, allows reposting of your published content by other members, and has a unique sense of community.

4. **Weebly**: You may remember Weebly being mentioned above as a good website host. It can also be used to create blogs. It is free to use with an optional upgrade for a fee. Having a blog with Weebly is recommended only if your organization also has a website.

5. **WordPress**: This is the most popular blogging site in the world. WordPress.com and WordPress.org are two different blogging platforms. For community organizations, WordPress.com is most appropriate, with a more basic blogging platform. To create a blog on WordPress is free; however, you can upgrade for a cost.

If you are still not sure which blogging service to use, reference the graphic below.
Choosing a Blog Service

There are many blogging and sharing services to choose from, and they're all different.

Follow the flowchart to figure out which one is right for you. Get started here.

Do you want your own website that you can customize?

Yes

Do you plan on writing mainly posts with lots of text?

Yes

Who do you want to see the things you share?

No

Only people I know

Everyone

When it comes to customizing the appearance of your blog, which is more important?

Easy-to-use customization options

Blogger

Advanced customization options

WordPress

Facebook

Twitter, for sharing short, text-based updates

Pinterest, for sharing images, links, and more
References:

1. Nonprofit website project - 10 top reasons why every nonprofit should have a website. Retrieved from http://nonprofitwebsiteproject.com/resources/10-top-reasons-why-every-nonprofit-should-have-a-website/

2. WIX blog - 7 must-haves that are missing from your nonprofit website. (2014). Retrieved from http://www.wix.com/blog/2014/02/7-must-haves-that-for-your-nonprofit-website/


Chapter 13: Social Media

Steps to effectively using social media:

1. Choose the right type of social media account. Check to see if there is an existing "business-type account" on the social media network you are interested in. Facebook has Facebook pages, YouTube has a Nonprofits on YouTube program, and Pinterest has Pinterest Business accounts. "These accounts usually come with features nonprofits need, like analytics and apps."¹
   - Fill out your profile
   - Build your connections
   - Search for people and keywords
   - Start following/adding people and other organizations.
   - Post your content (blog posts, photos, videos, resources, commentary)
   - Post other people’s content.
   - Tag people to get their attention, thank them, or recruit them¹

2. Promote your presence.
   - "Add social sharing buttons
   - Add social network follow buttons in a prominent place on your website. Usually this is near your email sign-up.
   - Add follow buttons to your print newsletter, signage, stationery and other marketing materials."¹

3. Create a Social Media Policy. "A social media policy is more than a document. It’s a process, a practice, a code of behavior that shapes a nonprofit’s presence on social networks. It answers essential questions like who can post what, and what to do when the trolls come."¹

4. Create a Social Media Strategy. Ask yourself questions such as; what do you want to achieve with social networks?, fundraising?, volunteer recruitment?, and advocacy?. "Social media strategy anchors your social networking actions and activities to SMART goals (specific, measurable, attainable, realistic, time-based). It measures, analyzes and refines."¹
While it's okay to have one person dedicated to social media, you have to keep in mind that one person can only do so much. Keep your social media channels to a minimum, between one and three is ideal. Make sure to ask which channels your constituents are on and engage them appropriately. "Focus your energy and time on the single most-used channel, but only if the return on investment (ROI) seems to be there. Note: It will be far more effective to use one platform well, rather than use multiple platforms in a half-baked way."\(^1\)

"Create some incremental benchmarks so you get a sense of how your investment is or is not paying off. That might be retweets and followers for Twitter or likes and shares for Facebook."\(^1\)

**Types of social media:**

**Facebook:**

Facebook is a free user-friendly social networking tool that can easily be adopted by any organization. It is a great way for you to connect with the community, keep them aware of what you're doing, and get feedback. Users of this social network range in age widely, almost guaranteeing you can reach part of your target audience. The process of setting up a Facebook page is described below along with tips on effectively using Facebook as a medium and some key definitions. Be aware that you must have at least one committed organization member to manage your Page.\(^2\)
Key definitions:

"Facebook page: Pages are for organizations, public figures businesses, and brands to connect with people in an official, public manner.

Profile/user account: A Facebook profile is intended to represent an individual person to connect with their friends and share information about their interests.

Administrator: A page administrator, or admin, controls the content and settings of a group and must administer the page via a personal profile.

Applications: A set of Facebook or third-party developed applications that can be added to a profile or page to increase engagement and enhance content.

News feed: Top news aggregates the most interesting content that your friends are posting, while the Most Recent filter shows you all the actions your friends are making in real-time.

Wall: The Wall is a central location for recent information posted by you and about you. It is where you keep your up-to-date content, and where fans can contribute.

Publisher: The publisher lets you share content on Facebook and is located at the top of both your home page and on your profile."

Build a page:

1. "Get started: If you already have a profile, go to www.facebook.com/page to choose your Page category and get started. If you do not have a profile, click the "create the page" link on https://www.facebook.com/ to create a Profile and Page together.
   - You must have an authentic Facebook Profile to manage a Page.
   - The Profile you create will automatically be the Administrator of the Page.

2. Adding content: Add a Page Photo and adjust the thumbnail. Wave over the top right corner of the profile picture box and select "Change Picture." Add a summary that tells users a little information about your organization, public figure, or business. You can also click "Edit Page" to change your profile picture and Page information.

3. The wall: The Wall is the place where your updates and posts are displayed. You can show posts from "Everyone" with the most interesting posts first, or posts from your Page in reverse chronological order. This is the space where all posts from admins and fans can appear. Click "edit page" and go to the "manage permissions" section to adjust who can post on your Wall and moderation filters.
4. Understand the features: The Like button is how users connect to your Page. When a person clicks the Like Button, a News Feed story is shared with his/her friends (e.g. "Robin likes Your Page"). These are your navigation links and applications. The pre-populated links may vary depending on your Page Category. Click "edit" to move and delete links. This is the Photostrip. The most recent photos that you tag your Page in or post to your Wall will appear here. To hide a photo, roll over it and click the X in the top right corner. Use the Publisher to post an update, poll, photo, link, or video. Type the text in the box and click Share. The content will appear on the Wall and in the News Feeds of people who like your Page.

5. More features: You can always find your Page by typing the Page Name into the Search Box. The number of people who Like your Page appears under the navigation links in the left column. "Likes" shows a list of other Pages that your Page is affiliated with or interested in. To feature a Page you like, click the Page's Like Button when you are using Facebook as your Page. Then click "Edit Page" and select the Page in the "Featured" section. You can feature "Page Owners" and link to their personal profiles from your Page. To feature a Page Owner, click "Edit Page" and select the Admin in the "Featured" section.

6. Use Facebook as your page: The "Your Settings" section of the Edit Page View allows you to set defaults for how you post to your Page-as yourself or your Page- and set up email notifications. Click "View all email settings for your pages" to enable other Page notifications. Select "Use Facebook as Page" in the Account Menu in the top-right corner to navigate and interact with other areas of Facebook as your Page. When you use Facebook as your Page, you will receive notifications in the top-left corner when people Like or interact with your Page.

7. Edit page (admins, applications, and more): Admins can be added and removed in the "Manage Admins" section of the Edit Page View. Type a friend’s name or email address in the text box to invite someone to manage a Page. When you send an invite to a friend, a Page Admin notification will be sent to him/her. These are the applications that are added to your Page in the navigation links section. Click on "Edit Settings" under the application title to add, remove, or name the navigation link.

8. Get insights (people connecting): Click "View Insights" to learn about who your audience is and how people interact with your Page. Page Admins can export most of these insights to an Excel or CSV file. Understand how many people are connected to your Page, and demographic and geographic information. Learn about the different ways people interact with your Page.

9. Resources: From your Page Manager you can view all of the Facebook Pages that you created or administer. You can always access your Page Manager by visiting: www.facebook.com/pages/manage

Tips for using Facebook:
1. "Adding a complete address to your Facebook Page activates Facebook Location. Facebook Location enables fans to check-in to your page and review your nonprofit.

2. Fans can “Save” your nonprofit’s Facebook Page. Nonprofits that have added Facebook Location activate the ability for fans to save their page as a place."

Twitter:

Twitter is a free type of social media utilizing real-time, social networking, and the concept of micro-blogging. It allows users to send short posts, or Tweets, of no more than 140 characters. Other Twitter users can read your Tweets, repost (retweet) them, and reply.

How to set up an account:

1. Log on to www.twitter.com
2. Enter your full name, email address, and a password
3. Select a username that is related to your organization's name.
4. Click the option "create my account." You will receive a confirmation email which will send you a link to verify your email address and account.

Adding to your profile:

One of the first steps you should take before your organization starts tweeting, is creating a solid profile. Any form of social media should present a positive and professional image of your organization. Your profile should "express what you are and what you stand for."

1. Profile photo: The picture you choose must represent your organization in a visual way. An example of this could be a logo or other image that embodies the work your organization is doing. The recommended photo size is 400 x 400 pixels.
2. Header photo: Use this photo space to be creative in expressing what your organization is all about. The recommended photo size is 1500 x 1500 pixels. Any photos added to Twitter should be in JPG or PNG form.
3. Profile bio: This space allows you to tell the story of your organization. You can include a link to your main website, Facebook page, etc. Your description will be displayed under your name and username on the profile header.
4. Pinned tweet: As time goes on and you start tweeting, choose your best one and pin it to the top of your timeline. To do this, click on the “more” option on the Tweet you have chosen. Select “Pin to your profile page."
Managing and upkeep:

Now that you have your twitter account up and running, you will want to have a plan in place for managing your activity. To attract and maintain the interest of followers, you need to consistently tweet items of interest.

1. Think about what your organization is hoping to accomplish through Twitter. Create a draft stating your vision and how you plan to accomplish it.

2. Decide on a target audience, this might not be your entire organization’s target but rather a specific group of people (those of a certain age). You will not be reaching everyone through Twitter.

3. Decide when to Tweet, i.e. how often, time of day, day of week.

4. Determine who will be assigned to managing your Twitter account.

5. Regardless of who is running your Twitter account, make sure you have good communication throughout your organization on what your Twitter goals are. Everyone can be involved in strategy development, measuring levels of success, and creating guidelines and policies. Inform other organization members what the benefits are to using Twitter.

How to Tweet effectively:

While staying consistent with your tweets is important, no one will be paying attention in the first place if you are not relating to your audience. Consider the following tips when tweeting.

1. Create Tweets that resonate: Make sure your tweets are exciting and interesting with content your audience with relate to. Include links, pictures and videos.

2. Keep Tweets short and sweet: The maximum characters per Tweet is 140 characters. This limit allows Tweets to easily be read, shared, and hopefully remembered. Reports have shown that Tweets shorter than 100 characters spur more engagement from viewers.

3. Use key words: Depending on your target audience, keywords for them will vary. Generally the following are good for Tweets: you, twitter, please, retweet, post, blog, social, free, media, help, please retweet, great, social media, 10, follow, how to, top, blog post, check out, new blog post.
4. **Make it real-time:** "Timing matters, especially for breaking news or live Tweets." How much timing matters will depend on the content of the Tweet, your objectives, your audience, their geography and more.

5. **Tweet often:** How often you Tweet will depend on your target audience, the purpose of your Tweets, and your organization's objectives. Decide how often your audience goes online, when they go online, and what information you are trying to get across. However often you decide to Tweet, keep it consistent. Tweet at the same time on the same day(s) of the week.

6. **Follow your interest:** As an organization, follow others who are in line with your mission and values. You can gain Tweeting ideas and affective methods by following others.

7. **Utilize existing conversations:** Engage in conversations of interest already taking place on Twitter. Look at those following conservation participants to get an idea of who you could possibly interest in your work.

8. **Use URLs:** "Adding a link in your Tweet can be powerful as it provides your readers with rich content. Full URLs however, can steal valuable character space. By using a shortener you will be able to include a longer message in your Tweet and you will leave space for people to add to your message when they retweet your post." A recommended shortener is [bitly](https://bitly.com/), which can be found at [https://bitly.com/](https://bitly.com/).

9. **Simply @reply:** "Engage other Twitter users in conversation using @replies and mentions. The @reply feature is intended to make communication between users easy and seamless."

10. **Use Twitter for marketing:** You can host contests or other participatory events through Twitter to engage your audience and let them know what your organization is all about.

11. **Use abbreviations:** Since there is a character limit on Tweets abbreviations help you say more.

12. **Be clear and concise:** Only use words relevant to the message you are trying to convey. Do not repeat yourself.
13. Use labels: "Labeling your tweet has some cool benefits. A label is like a tag at the beginning of your tweet. Your followers will know exactly what you are sharing right away and they may even increase your chances of being re-tweeted."8

Other general twitter tips:

You do not have to wait until you have your target number of followers, or even any followers for that matter, before you start consistently Tweeting. Creating a constant post schedule lets followers (and potential followers) know you have something to say.

1. A period is the difference between a public mention and a reply on Twitter. When you use a Twitter username as the first word in your tweet, you must add a period before the username for all your followers to see your tweet.7

2. Get into the conversation: Once you have started following people and have established a solid Twitter presence, get involved in the conversations people are having. You should be following community members and organizations doing work you are interested in. If something they post is of interest to your organization, reply to it.4

3. Don't spam: While interaction is extremely important to become engaged, do not overwhelm people with replies and direct messages.4

4. Find the latest buzz and contribute: Locate a topic that will be of interest to your target audience and tweet about it. Consider adding "please retweet" to the end of your Tweets. People interested in the topic may "retweet" or reply to you about the topic.4

5. Create relationships: Once you begin consistently Tweeting, you will start to form connections with the more active users. Use their high activity rate to your advantage. Reach out to them to further engage them in the work your organization is doing through their messenger.4

6. Integrate Twitter with other social networks: If you have a blog, Tweet every time you post a new blog entry. Advertise your Facebook page, encouraging people to add/Like you. The same type of advertising can be utilized in reverse. Promote your Twitter account on Facebook, your blog, your website, and any other social media sources you use. Mention Twitter in more traditional marketing sources such as an organization newsletter.4

LinkedIn:

"LinkedIn is a social network with over 53 million users that enables you to make better use of your professional network and help the people you trust in return. It's no secret that
LinkedIn is a great place to network professionally, post and find jobs, and answer questions and build thought leadership. It is probably the most obvious way to identify influential individuals at specific organizations. A search for your target business or title on LinkedIn will identify people you may already be connected with, either directly or through your connections. LinkedIn is a great tool to leverage your existing contacts to connect with people and find potential customers online.9

How to set up a LinkedIn account:

1. Go to LinkedIn at www.linkedin.com. Click on the “What is LinkedIn?” option on the menu across the top of the page to learn more. To create an account click the “Join LinkedIn Today” button on the right of the screen and enter your name, email, and a password.

2. Via the email address you provided, confirm your account. Now you can sign in and begin editing your company page.

3. Add information to your profile including a sub-heading, your organization’s field of work, and add a profile picture. You can list accomplishments and work your organization has done over the years. You can also include your mission statement, objectives, goals you have, and the direction your organization is going.10

4. "Customize your public profile URL with your name. You should edit your profile so that your LinkedIn profile URL looks like http://www.linkedin.com/in/yourname. To edit this URL, visit your profile, click on “edit” next to your public profile URL, and then “edit” once again on your public profile settings page.”9

5. To list skills your organization has and areas of expertise go to the "specialties" section. You can get endorsements for skills by other LinkedIn members.

6. Add Connections. Allow LinkedIn to search through your email addresses to find people to connect with. Connections might include those you have done work for or worked with. You can also search for someone on LinkedIn, a specific job title, or a company name. Network with people having similar interests and who work in your field.9,10

After setting up the account:

1. Use your organization’s page to post status updates, share news, find volunteers, and grow your community.

2. Encourage your volunteers, board members, friends and family who use LinkedIn to support your page. They can endorse your skills and promote your efforts.
3. Use LinkedIn to find and reach out to potential board members and volunteers.

4. Update your status for your connections to read. They should be brief and function to inform or spur people to action.

5. After you have connected with several people, you can start your own group. This group will be specifically for communicating with your organization's supporters. Through the group you can post relevant information, ask questions, and upload pictures.11,12

Tips for using LinkedIn:

1. "Join as many groups as possible.
2. Find people who fit your interests and connect with them.
3. Follow people in the groups you've joined. Most will follow you back IF your profile is 100% complete (meaning a picture).
4. Use these keywords in your profile and in what you share with your group.
5. If you are looking for donors, definitely take advantage of the search options and research tools on LinkedIn to find potential donors and supporters.
6. Participate in non-profit group discussions and look at other complementary groups where you would find your donors.
7. Make sure companies can find your organization.
8. Keep your LinkedIn company page updated.
9. Be able to communicate the importance of LinkedIn to your key stakeholders.
10. Promote your profile everywhere. Include a link to your profile and/or company page on your website, in individual blog posts, in email signatures, on business cards, on collateral, e-newsletters, etc.
11. Set your feed visibility to everyone."13

Instagram:

Instagram is a free mobile application which is available only on smart phones, however your account can be accessed on the web through any computer. The application allows you to quickly and easily edit photos in a professional way. You can take pictures with the application or use photos you have previously taken on your phone. Other organization members have the option of sending your Instagram account manager photos to use. Once the photo is selected in the application, you apply one of many filters. You can see how each
looks before making a decision. You can write a brief description of the picture, include hashtags to help others Instagram users find it, and post to other social media sites. Nonprofits can use Instagram to raise awareness for their cause. Visual representation of your organization’s efforts will go a long way. Think of Instagram as visual story-telling.14

**How to use Instagram:**

1. Choose someone in your organization to handle the Instagram account. They must have access to a Smartphone and will take most of the photos to be used. It is best to choose the person most familiar with Instagram. Other members can contribute images they have taken, but one person should be charged with handling the account.

2. On a Smartphone go to the "app store," search for "Instagram," and download the free application. Once it downloads, open the application, and register with either an email address or through Facebook. If registering with an email address, create a username, password, and fill out your profile.

3. Once your profile is complete, begin following anyone in your organization with an Instagram account, influential community members, target audience, and anyone you are trying to access with your photos. Those you follow will most likely follow you back.

4. Start posting photos! Ideas for photo posts are of events, important and interesting content from meetings, and your organization carrying out its work. Events are packed with opportunities for Instagram. You can document set up, clean up, the event itself, people at the event, and more.

5. Design your photo posts in a way that community members can find them and will take the time to look at them. Use keywords in the description to explain what the picture is all about and evoke the right response from the viewer. Hashtags are a great way to reach a larger audience and will be explained in the next section.

6. Tag other Instagram users who are in the photo, who were at the event, or who you are trying to thank. Click on the "Tag People" option to add people. You can also type "@" followed by a username in the description box to tag a person to the photo post.

7. When you post a photo you can add it to your "photo map." This tells the viewer where the photo was taken, i.e. where the event was held. While editing the photo and typing up a description you also type in the location of the photo. Once you have posted several photos you can view this "photo map" which will pinpoint all the locations you have posted photos from.

8. Instagram allows you to link up your account with other social media accounts, such as Facebook, Twitter, Tumblr, Flickr, foursquare, a blog, or a website.
9. Your photo posts will get "likes" and "comments" from other users and will hopefully cause other users to follow your account. Alternatively you can and should "like" and "comment" on other users photo posts.14

**Instagram tips:**

1. Post photos that are eye-catching and best represent your efforts. Pictures should evoke a certain emotion, i.e. inspired, outraged, motivated, delighted. In some cases the photo is solely meant to raise awareness of the issue. In other cases you may want to call the viewer to action, recruit them for an event, or ask them to participate in a campaign. The tone of the photos should be consistent and represent your organization.

2. Hashtags are an easy way to reach Instagram users. You can add as many as you would like to each photo post. A hashtag is the pound symbol (#), followed by a word or set of words without spaces. Some examples are #nonprofit, #socialgood, and #activism. These three examples are popular hashtags which you might consider using. All photo posts (both from your organization and others) with a certain hashtag accumulate in the same space on Instagram. Users can search specifically for hashtags. In a single photo post hashtags are generally placed after the photo description.

3. To achieve more engagement on Instagram try asking questions in your posts. You could also make a thought-provoking statement that would encourage viewers to engage. Invite your followers to use a certain hashtag to both form a collection of photos, but also have users actively participate. This hashtag could be something as simple as your organization’s name.15

**Google plus:**

"Nonprofit organizations work with so many different groups of people: volunteers, individual donors, funders, their boards, the general public, and more. Google+ helps nonprofits and causes engage with all these different groups of people in a customized way.

With your Google+ Page, your nonprofit has an online home where you can share photos, success stories, volunteering and fundraising information, project locations, and more. Post content publicly so people can find it via Google search. Regularly posting interesting content, engaging with your users by asking questions, and sharing photos and videos are all ways to keep people coming back for more.

Different people have different interests, and Google+ allows you to easily share relevant content with the right people. Think about the various audiences your nonprofit communicates with, such as volunteers and donors. Circles allow you to easily tailor content for a variety of audiences, making your messaging more relevant to your followers.
By creating different Circles for each audience, you can coordinate diverse groups by location, interest, specialty, purpose and more.

Nothing beats having a live, dynamic gathering around a topic that your organization works on or cares about. Hangouts let you set up real time high-quality video conversations with volunteers, donors, clients, and other followers with just a simple click. Just let your followers know when you’ll be hanging out and what topic you want to discuss.”16

**How to create a Google plus account and page:**

1. Assuming you already have a Google account (or Gmail), "login and click the “+You” link in the upper left and follow the instructions to create your Google+ Profile." Be aware that you must be registered as an actual person with a first and last name.

2. "While logged into your personal profile, visit plus.google.com/pages/create to create your page. Enter your nonprofit’s information. Select the “Company, Institution, or Organization” category on the left and then enter your nonprofit’s name, website, category, and make it visible to any Google+ user.

3. Enter your nonprofit’s tagline and upload your square avatar. Add an "Introduction" and upload at least five photos.

4. Post your first update and start promoting your page. To post your first update, go to your Home view and then post your first update. Make sure you don’t just post a link, photo, or video, but that you also add a personal message."17

**Google plus tips:**

1. "Segment your audience with "Circles". On Google Plus, users “follow” or “connect with” other users by adding them to a circle. Circles are ways to categorize your connections.”18 You might have one for other nonprofits, one for community members, etc.

2. "When sharing content on your profile (comparable to a status update on Facebook), you can select which circle(s) you want your content to be visible to. Circles make Google Plus a valuable marketing tool for organizations. They allow you to target unique messages to specific segments of your audience.

3. Use "Hangouts" as a free alternative to webinar and video-conferencing software. For nonprofits with a limited budget, Google Plus Hangouts is an extremely valuable tool. You can host a video chat with up to 10 people, or create a Hangout On Air to broadcast publicly.

4. Participate in "Communities" to engage in meaningful conversations with people who share a common interest. Google Plus Communities are similar to LinkedIn’s Groups, they are places within the social network where people can have
discussions, ask questions and provide expert advice. Unlike LinkedIn Groups (where only human users can join groups), Google Plus allows organizations to create and join communities and participate in discussions. Nonprofits can use Google Plus Communities to establish expertise and thought leadership among their target audience. It’s also a great way to find people with common interests to add to your circles."18

Learn from and connect with Google for Nonprofits at:
https://plus.google.com/+GoogleforNonprofits/posts

Other Social Media Sources:

YouTube: There are pre-existing nonprofit YouTube channels that your organization might consider joining. "YouTube is not just a space for storing your nonprofit’s videos. The video-sharing website can be considered as the second largest search engine in the world as well as the second largest social network." The majority of users are young, being under the age of 35. If your goal is to reach young people, this social network might be just what you need. You can accomplish a lot in just a few minutes or even seconds of video.19

Pinterest: "The social bookmarking site may hold more potential than you might think for your nonprofit." Most users are between 25 and 44 years old. "Pinterest’s value is not what happens on the social networking site — it is in what happens on your site. By putting "Pin It" buttons all over your website, you are turning Pinterest users into ambassadors that help take content from your website and distribute it to all their friends on Pinterest."19

Flickr: "Flickr is much more than a place to store photos or make prints. Members can join and create groups and participate in discussions on literally any topic. Flickr also offers social networking features that connect people and can help widen your organization’s online connections through photo-sharing. Each account has a photo stream, which displays photos uploaded by members chronologically. When you log into Flickr, you can see photos from your contacts’ photo streams; you can also subscribe to these via RSS."20 In order to use this social media you will need to have a Yahoo account. You will register for Flickr as an individual but can use it as an organization. You can use tags, titles, and descriptions on photos to allow users to more easily find your photos.20

Key points:

• Have an organization member who will be responsible for your website, blog, and any other social media.

• Remember to use your website and social media for community engagement and awareness.

• Allow community members to contribute, add their opinions, and give feedback.
• Web applications help you process donations, run contests, reveal insight, extend your presence, and much more.

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Chapter 14: Urban Blight and Adjudication Process

Basics of urban blight:

What is Blight?

Urban blight, also known as "urban rot" or "urban decay," is when a normally functioning city or a part of it undergoes disrepair and decrepitude. This process can be caused and/or characterized by deindustrialization, depopulation, a change in population, restructuring, abandonment of buildings, high unemployment, broken families, crime, political disenfranchisement, or an unlivable landscape. Throughout this section this state will simply be referred to as "blight." 1

Process of determining blight:

Although an entire city or large piece of it can become "blighted," the city council will determine when an individual property is blighted. This process is good to be aware of when trying to fix blight and is described below. A more in depth view of the procedures is listed later on.

1. An inspector notes any violations in a property and sends a Notice of Violation to the owner. The notice lists specific violations and the hearing date. The owner may correct violations before the hearing and be re-inspected.
2. If violations are not corrected and a hearing does occur, a judge will determine if the property is a "public nuisance" and/or "blight."
3. The property owner must correct the violations or decide to sell the property.
4. If the owner does neither, the city can seize the property. The New Orleans Redevelopment Authority (NORA) is in charge of taking ownership of the property. The owner is paid for the property. NORA is the main agency in New Orleans dealing with blight.2

For more information on how blight is determined visit the online New Orleans Housing Code Enforcement Handbook.

A property is blighted when:

- "It is chronically vacant.
• There are unresolved code violations for unsafe, unsanitary, or unhealthy conditions.
• It has been declared a fire hazard.
• It is lacking in facilities or equipment required by the Housing Code of the City of New Orleans.
• It has been deemed "demolition by neglect" pursuant to section 84-108 or 84-208 of the City Code.
• It has a substantial negative impact on the health, safety, or economic vitality of a neighborhood.
• It is a vacant lot that is abandoned, does not meet the requirements of the City Code or has been adjudicated.
• There is a vermin infestation."²

A single home with blight might not seem like a big deal, and is certainly better than an entire city being affected. Individual blighted properties can still cause quite a bit of damage to a neighborhood and trigger a snowball effect leading to blight in other homes. Property values will decrease when blight is present in the community and will deter neighbors from returning to their homes. The presence of empty lots is associated with more crime, violence, and safety hazard.³ "Dilapidated properties can generate contagious neighborhood decline, an exacerbated process often referred to as the Broken Window Theory."³

What is the Adjudication Process?

"Adjudication is the legal process by which an arbiter or judge reviews evidence and argumentation including legal reasoning set forth by opposing parties or litigants to come to a decision which determines rights and obligations between the parties involved. Three types of disputes are resolved through adjudication"⁴:

1. "Disputes between private parties, such as individuals or corporations.
2. Disputes between private parties and public officials.
3. Disputes between public officials or public bodies."⁴

In the case of blight, adjudication refers to the process which a property undergoes to determine its blight status and what will ultimately happen to the property.
Blight in New Orleans:

History of Blight in NOLA:

"New Orleans has the highest rate of blight in the United States, with three out of ten properties affected."³ Every city in the United States is to some extent affected by blight, however New Orleans is disproportionately affected. There are two main reasons for this; Hurricane Katrina and the Supreme Court ruling on Kelo vs. City of New London. These both caused significant increases in blight. After Katrina people left the city, many of whom did not return. In the year 2000 the number of vacant and unoccupied properties in New Orleans was 27,000, whereas after Katrina in 2005 it rose to 100,000. Around the country there has also been an emigration of families from cities out to suburbia. Kelo vs. City of New London ruling limited eminent domain and tightened standards for expropriation, mainly affecting NORA’s ability to use it. There are several other separate factors that play into high blight rates, such as legal issues impeding the adjudication process.³

Current blight situation:

Despite the large increase in vacant and unoccupied properties after Hurricane Katrina, as of September 2010 the number was down to 43,755 blighted properties in New Orleans. This still leaves New Orleans with one of the highest blight rates in the United States. At one point almost 25% of the residential homes and addresses in New Orleans were blighted or vacant. Certain neighborhoods are more affected by blight than others. Highly blighted neighborhoods include Central City, the Lower 9th Ward, the Upper 9th Ward, Gentilly, and Lakeview.⁵ The high rates of vacancy in these areas bring "higher rates of crime, violence, and public safety hazards" with them. This slows down the revitalization process.⁵

In 2010 Major Landrieu put an extensive blight reduction plan into place calling for a reduction of 10,000 blighted properties by 2014. This goal was accomplished reducing blight in New Orleans by 30 percent between September 2010 and April 2013.⁶

"Since the Blight Reduction Strategy launched:

- Over 54,000 Code Enforcement inspections have been performed
- Over 500 first time homebuyers have been assisted in buying a home through the City’s successful Soft Second Mortgage Program
- Over 4,000 properties have been demolished
- 72% of hearings received final judgment (vs. 49% in 2011)
- Median time from initial inspection to hearing dropped to 80 days
- $3.4 million has been collected through the City’s lien foreclosure process
- 440 low income families received financial assistance to bring their homes up to code
• Over 2,000 former Road Home properties were sold by the New Orleans
  Redevelopment Authority (NORA) and 75 percent of those new property owners
  met their compliance agreements by the one year deadline
• The City has secured over $30 million in federal funding to reinvest in blighted
  neighborhoods”6

This significant decrease in blight is also from the "continued repopulation of New Orleans
and rebuilding activity that shielded the City from the worst effects of the national
recession."7 Hearing officers have been reinstated, allowing hearings to commence. These
hearings are to determine whether or not a property is blighted. They can also declare
residences as public nuisances. Action cannot be taken by the city or other organizations to
fix the problem until a hearing has taken place.7

Individual residents and small organizations can also acquire a blighted property. There
are numerous programs one can go through. The Lot Next Door Program is an example of
one. This program allows qualified homeowners who share a common boundary with a
former Road Home property to purchase that property. The Growing Home Program is
another example which gives homeowners incentives to fence and landscape a blighted lot
next to their property.7 These and other options will be discussed later in this section.

To check the most up to date blight status in New Orleans visit:
http://blightstatus.nola.gov/. There you can search certain addresses for blight on a
particular street. Individual properties in violation will be listed with complete history. You
can see items in which they are in violation and the results of the hearing (if taken place).
The site provides all inspections, hearings, judgments, demolitions, and sheriff sales within
New Orleans in the last 90 days.8

If interested in purchasing a blighted property check out the Real Estate Sales List at
http://www.civilsheriff.com/RealEstateSales.asp for a list of properties available for
purchase, claim amount, and photos.

NOLA's blight process:

Understand the process specific to New Orleans:

Every city handles blight differently. Although the overall process might be the same,
procedures will vary. Get to know how the city of New Orleans specifically handles blight.

1. **Intake** - Code Enforcement Inspectors will "sweep" areas of the city for blight and
   properties in violation of housing codes. Citizens can call 311 to report blighted
properties and to receive updates on the status of prior complaints. Citizens can also check BlightStatus to receive updates.9

2. Input - Code Enforcement will create a case in LAMA for a property in violation, assuming no case had previously been created. LAMA is "the City’s parcel-based case management system."9

3. Inspect - Through the LAMA system Code Enforcement inspectors follow specific procedures in identifying violations on building exteriors and lot conditions. One aspect is digital photography. The current goal is 30 days between when the compliant is received, and case is created, and inspection. 9

4. Research - Once the inspection is complete, with all violations documented, research is performed by the Hearings Bureau to identify all owners of the property and anyone with legal interest. After the owners are identified, letters are sent to addresses where they might be found. 9

5. Notice - The next step is to schedule a hearing between 30 to 45 days after notices are sent out to owners. The city posts the property address, case number, and date and time of the hearing in "the official journal of the City of New Orleans."9

6. Day of Hearing - Any owners of the property in violation are legally required to appear at the Code Enforcement Hearings Bureau on the day of the hearing. If any work is being done to correct the violations, or work has already been completed, owners must bring proof with them. When an owner is not able to attend the hearing, they can send a representative to speak on their behalf, but are encouraged to seek professional legal counsel. Neighbors and other concerned citizens are allowed to attend the hearing, bringing photos of the property and personal testimony on why the property is in continued violation. Even if violations have been corrected prior to the hearing, the cost of the hearing may still be issued to the owners. 9

7. Judgment - If significant evidence of work being done on the property is presented, the hearing officer may schedule a future hearing date (reset the case). They may also dismiss the case entirely if they feel enough evidence of correction is presented. When a property is brought under full compliance, the owners will generally have to pay only minimal fees. On the other hand, if a property continues to be in violation of city code a Notice of Judgment is issued to the owner. This can be appealed, however if it is not, it must be "remediated and/or paid in full." "This filing will constitute a lien on the property and will give the City the authority to remediate the violations and/or seize the property for Sheriff Sale."9

8. Post Judgment Actions - Code Enforcement will evaluate properties with a guilty judgment and lien, for the best way to handle the blight or conditions of nuisance. There are three paths which the city can take for abatement.9
9. **Lot Clearing/Abatement** - The City works with NORA on a lot clearing program to cut the grass, weeds, etc. of properties identified with blight and repairs other unsafe conditions. These minor repairs done by the city, do not drop charges against the owner.\(^9\)

10. **Sheriff's Sale/Lien Foreclosure** - Those properties "approved for lien foreclosure will have writs filed with the Civil District Court" and be turned over for sale at auction by the sheriff's office. Proceeds from the sale will pay off liens, taxes, and sale costs. If money remains, it will go to the property owner. The main goal of selling the property is to transfer the property to a new owner or organization that will make the necessary repairs and bring it under code.\(^9\)

11. **Demolition** - Some properties that are beyond repair, will be set for demolition by Code Enforcement. After the demolition of a property, the lot that remains can be sold at a sheriff's sale if the remaining pieces are still blighted. The remains could also be transferred to the lot clearing program for maintenance.\(^9\)

**What is being done?**

The City of New Orleans has taken on several blight fighting initiatives to combat the problem throughout the city. Programs and tools have been created, departments have been rearranged, and policies have been improved. This year alone the city of New Orleans has budgeted almost $500,000 for new inspectors and other staff to speed up the blight process.\(^5\)

1. **Programs and tools:**

   - **BlightStatus (BlightSTAT)** - In 2012 New Orleans developed a website called BlightStatus. This site will be discussed throughout the section. It is a user-friendly online tool for "residents to track the progress of blighted units within the Code Enforcement system in New Orleans."\(^5\) The BlightStatus tool can be used by organizations and individuals who want to get involved in reducing blight, but also allows the city to measure blight against set goals.

   - **LAMA** - The city has introduced a new information technology system called LAMA. This system tracks code enforcement and permitting activities.

   - **Soft Second First Time Homebuyer Assistance Program** - "Provides purchase assistance and closing costs assistance to over 500 households throughout the city"\(^5\)

      - The Affordable Homeownership Development Program - Part of the soft second program which transfers previously blighted properties to rehabilitation and constructs low income housing.
• Neighborhood Stabilization Program "Phase Two" - This program has allowed NORA to provide $27 million in funding for over 470 units of affordable housing throughout New Orleans.

• Owner-occupied Rehab - The city partnered with other organizations to help rehab 520 homes belonging to low income residents who could not afford to make repairs after Katrina or were living in substandard conditions.  

2. Departmental changes: Housing Code Enforcement and Environmental Health departments have been merged to increase coordination and efficiency, resulting in over 54,000 inspections. The city hired research staff to look into real estate ownership of blighted properties. They prepare cases for legal action and file foreclosures on properties for Sheriff's sales.  

3. Policy changes: Improved administrative hearings to increase the number of blight cases being heard. Over two years the city cut the time between initial property inspection and hearing in half. Part of Mayor Landrieu's Blight Reduction Strategy strengthens code enforcement "by utilizing the enforcement tools available in order to obtain compliance, including Sheriff's sale or demolition." Since the introduction of the reduction strategy, New Orleans has filed writs of foreclosure on 1505 properties and demolished over 4,000 blighted ones.  

Additional information on the blight process: 

Below are additional existing policies and blight-related concepts. 

Tax Sale: The goal of a tax sale is to sell an investor the unpaid taxes on a property. If the homeowner does not pay back the investor, with interest and within five years, the investor may foreclose the property. This policy works best for maintenance of vacant land. "Community organizations in any neighborhood, or any kind of real estate market, can buy a property at tax sale and gain a "writ of possession" from a judge to gain access to major problem properties and maintain them. For transfer of property, tax sale is not an ideal strategy to buy property due to the difficulties with getting title insurance even after the 5-year period is up. However, if the tax sale lot is used as green space and not developed, title insurance may not be necessary. Soft-market areas with low property values are more likely to have properties with very high back taxes that may not sell at auction."  

The process of how it works is shown below.

• First the homeowner does not pay their property taxes.  
• The property is sent to tax title sale.  
• All bidders must pay the total amount of taxes due on the property. A low bidder will have a lower % ownership of the property.
• The original owner will have 3 years of "redemption" after the auction to pay back the money.
• If the original owner cannot pay the money in 3 years, the tax sale buyer should wait an additional 2 years to correct any legal issues.
• After a total of 5 years, the investor can foreclose on the property.\textsuperscript{10}

\textit{Adjudicated property sale or donation:} The objective here is to sell or donate properties that have failed to sell at tax sale in the past and have been "adjudicated" to the city. "Adjudicated properties are most likely to exist in soft market areas, because when a property's value is low, investors often won't purchase tax sale title, so the properties become adjudicated. Creating a City auction process for adjudicated properties with no minimum bid is possible. More research is needed to understand if City Charter allows this. Under state law, it's also possible to do a "Lot Next Door" type process if a resident has property that touches the adjudicated property and maintains the property for one year, state law allows the City to sell it to the adjacent owner for any price."\textsuperscript{10} The process of how it works is shown below.

• The property does not sell at a tax sale and is then "written in" to the City, as if the City won the auction.
• The City is required to wait the 5 years for possible repayment.
• After the time has passed, the city takes ownership and can either auction it, donate it, or do a "Lot Next Door" type process.
• Currently the City does not have a process for these properties.\textsuperscript{10}

\textit{Three-year Acquisitive Prescription:} The prescription goal is to "allow community members to use, maintain, and eventually own properties that have been officially declared blighted."\textsuperscript{10} This policy helps combat physical problems in a community by allowing "community members or others to legally hold and maintain blighted properties. The most physical benefits will come from transferring long-term vacant properties to neighbors, non-profits, or new private owners."\textsuperscript{10} There is a need for a willing title insurance company to provide title insurance for these properties. All back taxes must be paid by the person attempting to acquire the property.

The policy works best with "properties eligible for three-year acquisitive prescription are most likely to exist in soft market areas, where owners may have been absent for years without selling or maintaining their property. However, if owners have been absent for years, properties are also likely to have high back taxes that will need to be paid by the occupying person in order to gain title to the property. One possible target is properties owned by absentee non-profits, or non-profits that no longer exist."\textsuperscript{10} The process of how it works is shown below.
The property goes thru the Code Enforcement process.

It receives a guilty judgment for blight.

An individual declares intention to hold a property and maintain it. They send notices to owners and neighbors. (Owners, and then neighbors, have 1st right to possession under this law)

Whomever claims the property must maintain it for 3 years, pay all back taxes, and take all legal steps.

Once this is complete, the individual gains ownership of the property.10

Ground leases: These leases aim to "gain access to vacant land in a neighborhood by "ground leasing" the land at very low cost from current owners. A lease will state how long the community group or resident may use the land, and what the approved uses are. For example, a park, a farm, or a garden could be options. Usually the "rental" fee can be as low as $1 per year, because the community group using the land is helping the owner avoid code enforcement fines."10 Ground leases do not clear titles, nor do they need to. The title is the owner's problem, whereas the community is just "renting" the land.

Ground leases can work anywhere where a community wants to activate a vacant or overgrown lot. The owner must be willing to work with the interested party on a lease agreement. You can negotiate a longer lease agreement with the owner, allowing the property to be used for more permanent and larger projects.10

Neighborhood Participation Program for Land Use Actions - "The City Charter calls for "a system of organized and effective neighborhood participation in land use decisions and other issues that affect quality of life." The purpose of the Neighborhood Participation Program for Land Use actions is to provide timely notification of any proposed land use action affecting a neighborhood and to provide the opportunity for meaningful neighborhood review of and comment on such proposals.

In July 2012, the City Planning Commission (CPC) adopted the Neighborhood Participation Program (NPP) for Land Use Actions, a report recommending improvements to the CPC’s public notification and engagement processes. This report has been approved by the City Council and key portions have been implemented through changes to the Comprehensive Zoning Ordinance."11

Office of Recovery and Development Administration:

The Office of Recovery and Development Administration is made up of several departments within City Hall. Their main job is overseeing the recovery of New Orleans as a city and tracking federal
money provided for that purpose. Several changes have been made to improve ORDA’s ability to fight blight. They have created more comprehensible legal standards, a wider variety of enforcement tools, hired new staff, are utilizing new technology, have increased transparency, and are working to have financial and technical assistance available to homeowners.

The organization is conducting “sweeps” of neighborhoods around New Orleans to identify properties which are vacant and in violation of city laws. Violations could be on items such as building exteriors, roofs, yards, pools, foundations, etc. When an inspector finds a property with violations, a hearing can take place against the property's owner. These "sweeps" help put the blight fighting process into action, as nothing can be done to repair or sell an abandoned property until a hearing is performed after inspection. NORA, which is discussed in the next section, is in charge of dealing with properties found guilty of blight after the hearing.2

**New Orleans Redevelopment Authority:**

**About NORA:**

"The New Orleans Redevelopment Authority (NORA), formerly called the Community Improvement Agency (CIA), was created in 1968 to eliminate and prevent the spread of slums and blight in the City of New Orleans."12 They have the authority to:

- "Acquire real properties through negotiation, gift, or expropriation
- Dispose of said properties by sale, lease or donation
- Borrow money
- Issue bonds
- Provide security to support slum clearance and neighborhood development"12

As mentioned above, NORA is the main organization in New Orleans charged with the task of handling blight. Not long after hurricane Katrina, NORA was given almost 5,000 blighted properties by the city to handle. The focus became supporting neighborhood rebuilding projects, instead of individual property transfers. "Examples included the Habitat for Humanity’s Musicians’ Village and Make it Right’s redevelopment of housing in the 9th Ward."12

"NORA also became very active in commercial redevelopment of critical corridors, including O.C. Haley Boulevard and the Gentilly Woods Shopping Center, as well as broader economic development projects such as the redevelopment of land surrounding the proposed VA hospital. More importantly, NORA developed deep relationships in neighborhoods and worked with neighborhood organizations to implement all plans in conformity with neighborhood planning efforts. By partnering with 11 community-based organizations...NORA is a community partner, focusing its efforts on all the elements – housing, commercial development, and larger scale neighborhood revitalization efforts that make our great city even greater."12
Role in Blight:

When the city seizes a property after a hearing NORA will take ownership of it and pay the previous owner. That being said, one of the best ways to tackle blight is to implement reinvestment strategies. They allow NORA to speed up the process of appropriations for selling blighted homes and allow better handling of existing properties. There are six ways in which NORA can acquire properties; "transfers of tax adjudicated properties from the City of New Orleans, expropriations completed prior to 2006, expropriations completed subsequent to 2006, transfers of properties acquired by the Road Home Corporation, transfers of property interests by the city of New Orleans resulting from code enforcement liens, and direct market purchases." Reinvestment strategies also gives potential individual buyers the ability to purchase property directly from NORA, bypassing the complicated legal expropriation process. Making purchasing easier will attract more buyers, as will the resulting lowered transaction costs.

"In order to stabilize funding for NORA and the administrative blight hearings, the New Orleans city government and NORA must establish a strong and effective relationship with a new Cooperative Endeavor Agreement. CEA's are legally binding agreements between the Mayor's office, the City Council, and NORA that establish funding agreements. The creation of a modified CEA will aid in the stabilization of the budget for blight administrative hearings and NORA. The most recent CEA represents a $38 million commitment to NORA by the city of New Orleans. It is funded as a portion of the city's $411 million in Disaster CDBG funding administered through the Louisiana Recovery Authority (LRA). Under this agreement, NORA will implement a number of programs on behalf of the city of New Orleans to help fight blight, maintain public health and safety, and spur development."

"NORA was the only Louisiana applicant selected to collect part of the $1.9 billion under the federal Recovery Act's Neighborhood Stabilization Program." A simple way to secure sustained policy is to make NORA's funds "untouchable," meaning they cannot be used for any other purpose or budgetary needs. In the past several blight fighting programs and initiatives have not been given enough time to be successful. By locking down NORA's funds, programs will have a chance to be successful.

The Lot Next Door Program:

A program within NORA, "the Lot Next Door Program was created by the New Orleans City Council in 2007 to allow residents to purchase a NORA-owned property immediately next door to their own." It provides an opportunity to owners of a property that share a common boundary with a former Road Home property to purchase that property. The program was revised with a new ordinance in February of 2013. The requirements for the Lot Next Door Program are as follows:

- Property for purchase must be a former Road Home property in NORA's ownership
- Purchaser must not owe any taxes or liens on any property owned in Orleans Parish
• Participants must have a homestead exemption on their property
• Purchaser should live directly to the right or left of the property NORA owns
• Currently comply with City building codes and health and safety ordinances on all properties owned in Orleans Parish
• Be prepared to pay NORA the appraised, fair market lot value plus legal fees and costs
• Plan to hold ownership of the subject property for at least five years or pay a penalty”13

Since late 2010, over 811 Road Home properties have been sold through this program. "Beginning summer 2008, NORA sent notification letters by registered mail on a rolling basis to eligible homeowners. Letter recipients were determined based on the status of their city tax and homestead exemption records and whether they are adjacent to NORA-owned or potentially owned property.”13

Growing Home Program:

"The Growing Home Program has assisted over 730 lots, creating green spaces to repair neighborhoods. Through the Growing Home program eligible participants will receive credits, up to $10,000, to reimburse for fencing and landscaping the lot next door. Improvements potentially eligible for credits include trees, native plants, raised planters, permeable paving and fencing.”8

Additional resources for maintenance of guilty properties:

1. Collaborative Nuisance Abatement Program - A partnership between the City and NORA to allow NORA vendors to maintain vacant lots with guilty judgments. Call the code enforcement department at (504) 658-5050 for more details.

2. Lot Maintenance Program - Another partnership between the City and NORA also allowing NORA vendors to maintain vacant lots with guilty judgments. Charges for maintenance are placed on the property tax bill. The program will begin in 2014. Contact your City Councilmember’s office for details.10

The Road Home Program:

About the program:

The Road Home Program is another effort to rebuild New Orleans in a safer, stronger, and smarter way. "Increased flood protection, improvements to municipal drainage and pumping capacity, the adoption of updated building codes, and the use of smart planning
have all contributed to a safer Louisiana."\textsuperscript{14} There are two programs within the larger Road Home Program, which are the Homeowner Assistance Program and the Small Rental Property Program. The main program website provides useful information on qualification criteria, links, and current statistics. "While there is still much work to be done to rebuild in Louisiana, the Road Home program is now concentrating on compliance and monitoring; a process in which homeowners show that all requirements of the federal grant process have been met."\textsuperscript{14}

**Homeowner Assistance Program:**

Through the "Homeowner Assistance Program, over 130,000 residents across the Louisiana coastal region have received more than $8.9 billion to rebuild and protect their homes and rental properties from future storm damage... The program has had, and will continue to have, a tremendous impact on the largest rebuilding effort in American history."\textsuperscript{15} Because some participants in the program have encountered obstacles to rebuilding, the Homeowner Assistance Program continues to help individuals on a case-by-case basis.

**The Small Rental Property Program:**

"In addition to assistance for residential homeowners, the Road Home - Small Rental Property Program has provided over $400 million for the restoration of nearly 8,500 rental units.

Prior to Hurricanes Katrina and Rita, many low to moderate income working families in Louisiana lived in single-family homes, duplexes, and small multi-family buildings that were owned and operated by small-scale rental property owners. Many of these small rental properties were destroyed or severely damaged by the storms. The repair of these rental properties, in conjunction with the other Road Home programs, ensures that families are given the opportunity to return to Louisiana. The Small Rental Property program seeks to rebuild one- to four-unit rental properties to address the housing needs of low to moderate income people in the most heavily damaged areas. The Rental Program provides financial incentives in the form of forgivable loans to property owners to help restore their damaged units and offer them at affordable rents."\textsuperscript{15} Funding for this program comes from the US Department of Housing and Urban Development (HUD) through Community Development Block Grant (CDBG) funding to the State of Louisiana’s Office of Community Development (OCD). "The Small Rental Property Program (SRPP) is run with the assistance of a team of private companies that specialize in housing and community development."\textsuperscript{15}

**Unmet Needs:**

*What is Unmet Needs?*

"People who received Road Home grants and promised to return home may have encountered problems that left them unable to do so. The Road Home Program has therefore created an Unmet Needs process to assist some of these homeowners. People
who have faced certain approved Unmet Needs, outlined below, and who can provide
documents to prove it, may be able to receive additional help returning home. No monies
will be distributed to applicants; instead, they will be used to pay for rebuilding
measures.”16

Who is eligible?

The policy is applicable to homeowners who:

1. "Received a Road Home award and chose Option 1, have not met the terms of their
grant agreement, and are subject to recapture of grant funds; and

2. Have not returned home (unable to re-occupy the damaged residence) and/or have
not completed elevation (if they were required to elevate). Help may also be
available if the homeowner has returned home but the home still doesn't meet
habitability standards.”16

What are the approved Unmet Needs?

1. "Contractor/builder fraud - Contractor fraud is defined as an act committed by a
contractor, misrepresenting themselves to a customer (applicant), in which services
were not performed according to a binding contract. Examples are as follows”16:

   • "Contractor received payment but did not start project
   • Contractor received payment but did not complete or completed repairs that
     rendered structure uninhabitable
   • Contractor received payment but did not deliver home or delivered home in
     an uninhabitable state”16

2. "Involuntary forced mortgage payoff - An involuntary forced mortgage payoff is
when the mortgage company forced you to use your Road Home Funds to either put
a large payment toward your mortgage balance or to pay your mortgage off in full,
with the funds. This cannot be a voluntary payoff.

3. Theft/vandalism - Theft/Vandalism identifies that there was intent by another to
steal and/or destroy your personal property. Personal property includes items
and/or materials purchased with your Road Home funds, to repair your damaged
residence. Examples of theft/vandalism include having building supplies and
materials stolen, or the structure on your property suffering damage of some kind
(e.g. pipes removed, graffiti, etc.).
4. Damage from a subsequent event - Your damaged residence was repaired and rebuilt with your Road Home funds and, due to a subsequent event (storm, fire, or flood), you experienced damages.

5. Contaminated drywall - During repairing and/or rebuilding your damaged residence, with your Road Home funds, contaminated drywall was installed in your home and had to be removed.

6. Reclassify Elevation Funds - If you received the Road Home Elevation Incentive from the Road Home Program, but were unable to elevate your home due to cost, and used those designated funds to repair and/or rebuild your damaged residence. Reclassification of the elevation funds to another grant that you received may be applied.

7. Other Circumstances - Other circumstances that occurred after your initial Road Home closing that may have hindered and/or delayed you from repairing and/or rebuilding your damaged residence with your Road Home funds. Examples include needing additional time to complete repairs or the death of the applicant or co-applicant (if applicable).”

"If you believe you may be eligible for this program, you should contact the Road Home Call Center at 1-888-762-3252 (TTY callers use 711 relay or 1-800-846-5277) to discuss the status of your file or schedule an appointment with an Outreach Advisor. For further information and to obtain sample forms, visit the Road Home website at https://www.road2la.org/. Please be aware that you will have to be able to produce documents that prove your Unmet Need.”

**Other major key resources:**

In addition to the information provided in the City Council’s handbook, there are a number of other valuable City resources that make understanding and following the code enforcement process easier. Several are listed and described below. Use these in addition to the other resources cited throughout the section.

**City Attorney’s Office:**

"The City Attorney is responsible for directing and supervising the legal affairs of the City of New Orleans. The City Charter defines the duties of the City Attorney as follows:

- To provide legal advice to the Mayor, the Council, and other city offices, departments and boards;
- To take charge of all legal matters in which the City has an interest or is a party;"
• To prepare proposed ordinances upon request of the Mayor or City Councilmembers; and
• To review all City contracts, documents and instruments creating any legal obligation affecting the City.
• The City Attorney’s Office has a dedicated team of public servants committed to providing aggressive and competent legal representation on behalf of the City of New Orleans for the benefit of all of our citizens."17

City of New Orleans:

"The City of New Orleans has extensive information on their website for everything from Code Enforcement to housing, social services and other resources that serve citizens."18

Soft Second Mortgage Program:

"The Soft-Second Mortgage Program promotes homeownership opportunities for low-to-moderate income individuals or families buying their first home."19 The program also encourages neighborhood stabilization and the development of new residential neighborhoods. These mortgages are available to residents in Orleans Parish in all neighborhoods. There are higher subsidies in particular areas, known as "Place-Based Strategy Areas."19 To find out where these areas are, check out the following link: http://www.nola.gov/softseconds/. "Soft Second Mortgages are available to single or double occupancy houses located in Orleans Parish. All houses applying for a soft second mortgage must meet the Housing and Urban Development (HUD)’s Housing Quality Standards."19

There are two programs within the Soft Second Mortgage Program. These are the Direct Homebuyer Assistance Program and the Affordable Home Development Program.

• Direct Homebuyer Assistance Program - This program "provides down payment and closing costs subsidies to eligible first-time homebuyers. The subsidies bridge the gap between the price of the home (including closing costs) and the maximum amount a homebuyer can borrow with a first mortgage loan. The homebuyer receives only the amount of soft second funding that is needed to close the affordability gap."20

• Affordable Home Development Program - This program "is designed to provide a steady inventory of houses that will be available for sale and be affordable to residents of low and moderate income. Through an open and competitive process, the City will award developers a set-aside of soft second subsidies for the
purchasers of their completed homes. Awards will be made with special consideration for areas of the city with the most need for redevelopment. The program will encourage the rehabilitation of blighted, historic properties and infill housing.”

Property Viewer:

"The Property Viewer provides zoning information for all properties within the City of New Orleans. The viewer includes all zoning districts, zoning district boundary lines, and the locations of site-specific zoning actions approved by ordinance which includes Conditional Uses, Exceptional Uses, and Planned Development Districts." The Property Viewer can be accessed at: [http://property.nola.gov/](http://property.nola.gov/)

Quick Instructions:

- "Click anywhere on the map within Orleans Parish to get Planning and Zoning information.
- If using a mobile device, you can use the location button to get information.
- You can also search for municipal addresses by typing in the full address using the search button.”

Civic Source:

CivicSource is a leading online auction marketplace. The site allows you to view auctions, certificate sales, deed sales, and gain information on auctioneers of specific parishes. There are also process guides and site guides available with information on the tax title sale process, the adjudicated property sale process, and how to use the site.

Department of Code Enforcement:

This department "works to eliminate blight in New Orleans by ensuring every building is in compliance with City Code and enforcing building codes against properties that are determined to be public nuisances. The purpose is to protect the health, safety and welfare of the general public and the owners and occupants of dwellings and dwelling units used or intended to be used for the purposes of human habitation.” On the department’s website you can do the following:

- Report a blighted property
- Find out more about the blight process
- Access the hearings calendar
- Attain information on BlightSTAT meetings
- Search blighted property records
- Obtain a document checklist for hearings
Habitat for Humanity:

Mission: "New Orleans Area Habitat for Humanity (NOAHH) is a 501(c)(3) non-profit organization, incorporated in 1983 as an independent affiliate of Habitat for Humanity International (HFHI).

Since its inception, NOAHH has been working in partnership with hard working, low-income families in New Orleans to build and finance new, safe, affordable homes. The program makes homeownership possible for families who are unable to qualify for traditional home loans but have a stable job, good or no credit, and the willingness to contribute 350 hours of sweat equity to the building of Habitat homes.

New Orleans continues to rebuild housing that was destroyed by the devastating flooding of Hurricane Katrina. NOAHH has become a beacon of hope in this rebuilding process by recruiting and deploying tens of thousands of volunteers to construct new homes in damaged, blighted neighborhoods. With the support of our volunteers, donors, and partners across the country and even the world, NOAHH's homebuilding capacity has increased annually since 2005. New Orleans is a city with historically low rates of homeownership and high levels of poverty, yet it is a place of resiliency, hope, and cultural vibrancy.

History: New Orleans Area Habitat for Humanity was founded in 1983 and averaged a building capacity of 10 homes per year until Hurricane Katrina in 2005. Post Katrina, New Orleans Habitat has built over 617 homes (as of July 20, 2013). The affiliate has more than 30 full time employees, a ReStore discount home improvement store and more than 720 partner families. New Orleans Habitat for Humanity's Musicians' Village is one of the most notable rebuilding projects in New Orleans. The Village is home to 72 partner families in the Upper Ninth Ward of New Orleans and the Ellis Marsalis Center for Music."

Find more information on how residents can qualify for home ownership and how community organizations like yours can get involved on their website:
http://www.habitat-nola.org/.

Louisiana Land Trust:

"The Louisiana Land Trust is a nonprofit organization formed to manage the properties that have been purchased by the State of Louisiana under the current Road Home Program as part of the ongoing recovery effort from the damage caused by hurricanes Katrina and Rita in 2005.

The Louisiana Road Home Corporation Act became effective on June 29, 2006 under Senate Bill No 445. This Act created a non-profit corporation whose mission is "to finance, own, lease as lessee or lessor, sell, exchange, donate or otherwise hold or transfer a property interest in housing stock damaged by Hurricane Katrina or Hurricane Rita." This act gave the Road Home Corporation (now doing business as the (LLT)Louisiana Land Trust ) broad
powers to receive and dispose of the properties, to accept funds “from any sources,” to borrow against these properties and to obtain payment for these obligations and to “enter into any and all agreements,” necessary to carry out its mission. This would be done under the guidelines “set forth by the Louisiana Recovery Authority” and to provide for financing “as administered by the Office of Community Development.” Funding for the Louisiana Land Trust is provided through Community Development Block Grant funds administered by the Office of Community Development.”

Office of Community Development:

"The Office of Community Development works to stabilize and revitalize communities in the City of New Orleans through the development of affordable housing and economic opportunity, and the delivery of community services that support Orleans Parish residents. The City of New Orleans currently operates under the 2012-2016 Consolidated Plan, which identifies priority housing, community development, and continuum of care needs and strategies to address these needs."26

Orleans Parish Board of Assessors:

"The Orleans Parish Board of Assessors which is made up of seven assessors, is responsible for annually establishing fair market values for all properties, including residential, commercial, business and personal property records of approximately 166,000 real, and 11,000 business accounts. Their website includes a searchable database to locate individual tax records. Using the database you may find property owners and verify homestead exemption."27

Their mission is to "ensure that every property in Orleans Parish is on the property rolls at its market value so that every owner pays their fair share in taxes, no more, no less."27 Their site provides viewers access to necessary information for reviewing a "property's fair
market value and comparing it to others like it." They also answer questions about the office and the property assessment process in general, provide useful forms and a tax estimator, and allow contact for additional information.27

**State of Louisiana:**

The state's site is home to an alphabetic index of Louisiana state agencies, department information, and an organization chart of state government entities (with contact information for each).28

**The Finance Authority of New Orleans (FANO):**

*Bond Loan Program:* This program "is a low interest rate first mortgage loan offered with or without closing cost assistance to the mortgagor. Bond loans may be made to both first time AND non-first time homebuyers. First Time Home Buyers are eligible for up to 4% of the loan amount toward down payment or closing cost assistance grant. First Time Home Buyers whose income exceeds program limits are NOT eligible for down payment or closing cost assistance grant. Non-First Time Home Buyers are not eligible for down payment or closing cost assistance grant. The Finance Authority's Low Interest First Mortgage Bond Loan and the City of New Orleans Soft Second Mortgage Program may be combined."20

"Eligible borrower(s) participating in the City of New Orleans Soft Second Program may use this first mortgage bond loan at the 4.00% interest rate, but will not be eligible for additional down payment or closing cost assistance beyond that provided by the City of New Orleans. Minimum required contribution for borrower(s) using the City of New Orleans Soft Second Program will be determined based upon the criteria of that program."20

If you are a first-time homebuyer you may use the mortgage loan program with the City of New Orleans Soft Second Mortgage Program. When you apply for your loan, you must inform the mortgage originator your intents of combining the Finance Authority's Low Interest First Mortgage Bond Loan and the City of New Orleans Soft Second Mortgage Program.20

"In addition to financing home mortgages, The Finance Authority of New Orleans provides tax-exempt bond financing for public facilities, facilities owned by non-profits, multi-family housing and all forms of community & economic development. The Finance Authority programs are authorized by the New Orleans City Council."7

**U.S. Department of Housing and Urban Development:**

"HUD's mission is to create strong, sustainable, inclusive communities and quality affordable homes for all. HUD is working to strengthen the housing market to bolster the
economy and protect consumers; meet the need for quality affordable rental homes; utilize housing as a platform for improving quality of life; build inclusive and sustainable communities free from discrimination; and transform the way HUD does business. HUD provides funding to New Orleans revitalization efforts in many ways including the recent generous NSP2 grant awarded to NORA and our associated 13 Community Consortium Partners."

A complete list of departments within the New Orleans city government can be found here: [http://www.nola.gov/departments/](http://www.nola.gov/departments/)

Departments of special interest:

- **City Planning Commission:** More information about the commission can be found at [http://www.nola.gov/city-planning/](http://www.nola.gov/city-planning/).

- **Code Enforcement:** "The City department primarily is tasked with addressing the blight issue in New Orleans through the enforcement of the City Code. Their website, accessible at [http://www.nola.gov/code-enforcement/](http://www.nola.gov/code-enforcement/), hosts a handful of links to other City resources. Homeowners who have received notice to attend a hearing should always check the Code Enforcement website for the most up-to-date information about Code Enforcement requirements. This department is in charge of the online city mapping tool called BlightStatus, which hosts an updated map of the Office of Code Enforcement’s responses to citizen blight reports. Users can search for specific properties or browse the citywide map to learn the status of individual cases as they progress through the code enforcement process."

- **Foundation for Louisiana:** "The mission of the Foundation for Louisiana is to invest in people and practices that work to reduce vulnerability and build stronger, more sustainable communities statewide. The Foundation has provided emergency relief to more than 30,000 residents, helped 8,130 families into safe affordable housing, assisted 3,012 small businesses to re-open, and engaged thousands of residents in neighborhood planning and leadership development. The Foundation’s high-engagement grant-making practices have strengthened the region’s nonprofit sector by providing both funds and the guidance necessary for small organizations to have their greatest impact."

- **Office of Coastal and Environmental Affairs:** The department can be accessed at [http://www.nola.gov/environmental-affairs/](http://www.nola.gov/environmental-affairs/).

- **Parks and Parkways:** This department can be accessed at [http://www.nola.gov/parks-and-parkways/](http://www.nola.gov/parks-and-parkways/).
• *Property.nola.gov*: "Another tool for looking up legal information about individual parcels, [http://property.nola.gov/](http://property.nola.gov/), allows users to search by address, owner name, or tax bill number. Users can view the location information, owner/valuation information, and planning/development information that the City has on file. (The last category includes flood information, historic district designation, and planning district designations for each parcel.)"¹⁶

• *Data.nola.gov*: "Data.nola.gov, accessible at [https://data.nola.gov/](https://data.nola.gov/), is the City's clearinghouse for the open datasets used to produce the resources listed above. Records of Code Enforcement, BlightStatus, and NORA functions are listed and updated here periodically and can be accessed online or downloaded for later analysis."¹⁶

• *One Stop*: "The City's consolidated point of contact for any licensing, permitting, or City Planning Commission applications. The One Stop Shop is accessible online at [http://www.nola.gov/onestop/](http://www.nola.gov/onestop/) or on the 7th Floor of City Hall. Information available on their website includes details about specific permits, a searchable records database, and a planning/zoning lookup tool."¹⁶

**How to survey for, report, and handle blight:**

**Surveying your neighborhood:**

Surveying a neighborhood for blighted properties is often the first step in tackling blight. It opens your eyes up to the barriers and opportunities that exist in an area. Surveying methods will be discussed further down in this binder section. From your property survey, you can identify where blighted properties are and how many there are. The next step is to research identified properties for ownership, what steps the city is currently taking to address the problem, and which properties will be the easiest to buy or fix.¹⁰, ¹⁶

"Using the Orleans Parish Assessor's website at nolaassessor.com you can learn who owns a particular piece of blighted property, the owner’s mailing address, whether the property has had tax sales, or been adjudicated."¹⁰ "Like the BlightStatus tool, users can search for a specific owner name, tax number, address, or they can browse the map to find information about any property. This is useful when trying to contact the legal owner of a property in question."¹⁶

With this info you can:

1. "Contact the current owner to: warn them about potential code enforcement fines, ask them to maintain their property or hire a local landscaper to do so, ask them if they are interested in selling or donating their property.

2. Use tax information to: determine if the property is likely abandoned (ex. no taxes have been paid in 15 years), determine whether acquiring the property or trying to
promote it for sale is a good option, or if back taxes or legal issues might prevent this."^{10}

**Determine Ownership:**

One of the biggest problems when it comes to fighting blight is determining ownership of a property. Although it may be tricky for some properties, it can be done by utilizing the available resources, such as [http://nolaassessor.com/](http://nolaassessor.com/), mentioned above. A property could be owned by several different people including the "homeowner, lender, servicer, real estate firm, investor, non-profit, or government entity." Because properties will change hands somewhat frequently, you should cross-check the city's records with other sources. Neighborhoods can use ownership information to hold someone accountable for code violations and other problems occurring in a home (whether it be vacant or not).^{13}

One of the main tools available for neighborhood organizations to help determine ownership is the online Geographic Information System (GIS) created by the City of New Orleans. This tool "allows users to search properties by address, property owner name, or tax bill number."^{13} "The Board of Assessor’s website allows users to search for tax records. The Louisiana Secretary of State Commercial Division Corporations Database is searchable by person, business, or specific document."^{13}

**Reporting and following blight:**

Once you have identified blight in your neighborhood, the next step is to report it. Below are several resources for you to use in reporting.

1. **Nola 311**: This city "knowledge base" can be accessed online at [http://www.nola.gov/311/](http://www.nola.gov/311/) or by phone at 311. The information functions with two goals in mind; to ask questions about City services and report problems with City infrastructure. To report blighted properties to the Department of Code Enforcement, call 311. Stay up to date on the property case by tracking the case number you are given and checking the BlightStatus map.^16

2. **Track blight properties close to you**: "Make a note of the address and any special considerations about the status of the structure. Drug activity, vagrants, high weeds, trash/debris, open windows/doors, rodents, and structural problems are all reportable issues.
   - Notify the 311 operator if you are interested in purchasing the property sent to Sheriff Sale.
   - Notify 311 if the building is in imminent danger of collapse - special steps can be taken to demolishing an abandoned building if it poses an immediate threat to properties around it.
   - If you think some might be using the abandoned building as a dwelling, you can contact Unity of GNO's Abandoned Building Team.
• Optional: Look up the owner on the tax assessor's website, at the One Stop Shop, or on [http://property.nola.gov/].

3. **Use BlightStatus**: "Follow the code enforcement process at [http://blightstatus.nola.gov/].
   - The city hosts BlightStat meetings on the second Thursday of every month from 8am-10am in the 8th floor conference room of City Hall. You can attend these to find out more about the City’s tracking process." BlightStatus will continue to be explained throughout the section.

4. **Attend the Code Enforcement hearing**: "Most properties now make it to hearing in 90 days or less.
   - At the hearing, the property will be declared either "Guilty" or "In Compliance." If it is declared "Guilty" the property will be fined and possibly demolished, mowed, or sold in a Sheriff’s sale. By attending the hearing, you can voice your complaints about the property and influence the final outcome.
   - To find out when a property is scheduled for hearing, check the hearings calendar at [http://www.nola.gov/code-enforcement/calendar/]. The hearings calendar will give you the exact time and date. Alternatively, you can call 311 or look on [http://blightstatus.nola.gov/]. Hearings are small, usually with only 3 or 4 people in attendance. They take place in an office, so you will not have to give a public speech."

**Vacant Land Strategies:**

"Vacant land is a natural product of deteriorating buildings and the code enforcement process. Empty space can pose a different sort of problem to neighborhoods than that posed by shuttered buildings. Abandoned lots accumulate an unsightly mix of garbage and weeds, becoming eyesores that attract crime, depress nearby home values, and pose health risks.

In partnership with United Saints Recovery Project, Jericho Road Episcopal Housing Initiative has developed a strategy for beautifying and stabilizing vacant lots in the Central City neighborhoods they serve. Jericho Road and the Tulane City Center released a handbook of vacant lot solutions for New Orleans neighborhoods; it is now available from Jericho Road's website at [http://www.jerichohousing.org/vacant-land-site-strategies-jerichoroad.pdf]. The 40-page document describes policy and program structures; provides information about species of groundcover, fences, and trees; and illustrates the need for a cohesive vacant land management strategy.

Included in the guide are suggestions for what to do with vacant lots. Plans include suggestions for different kinds of vegetation—from ground cover to trees—and suggestion for how to turn empty lots into orchards, community gardens, pocket parks, and assets for storm water management."
Planning for Action with Your Community:

1. *Bring your neighbors together:* "For a strong visioning process, you need residents representing the diversity of the community to be part of a planning event or event(s). It's especially important to capture the views of youth and seniors. Schedule at least three hours to work on creating a vision and action plan for reducing blight and building assets."\(^\text{10}\)

2. *Study your property survey:* "Use your neighborhood map of blighted properties to see where there may be clusters of blight, and where you see strategic opportunities to focus efforts. Take into account whether the majority of your blight is structures, vacant lots, or both."\(^\text{10}\)

3. *Understand your market type:* "In a soft market (low property values), you need a long-term strategy for building assets and using vacant land."\(^\text{10}\) Development will take time if it costs more to build a home than the house will ultimately sell for. Strong markets (high property values) come with the issue of "getting speculators to let go of properties," however development is much easier.\(^\text{10}\) Find out more about markets in the "Real Estate" subsection of the binder.

4. *Start your visioning with SWOT:* A SWOT analysis works to identify certain ideas and elements for use in an action plan. The "S" stands for "strengths," which are any advantages or assets your community has internally. The "W" is "weaknesses," or disadvantages and barriers internally present within the community. "Opportunities," or the "O", represent ideas, resources, plans, and partners outside of the community. Finally "threats," or the "T", represent issues and problems outside of the community that may impact your efforts.\(^\text{10}\)
5. **Map your assets and identify partners:** There are several ways to look at your assets and where help is needed. One version is "we can," where both you and your community can accomplish the goal. "We know who can" means an organization with whom you partner could execute the strategy. "We can’t and don't know who can" means your community should identify more partners and resources to help.10

6. **Develop short-term and long-term strategies:** It will be helpful to create a list answering the following questions:

   - "What are the 5 most effective things to do now?
   - What are the 5 things you would like to see happen-that will take time to advocate for or to create?
   - Which 5 properties will be easiest to acquire, or to change by working with the owner?
   - Which 5 properties most need to be improved?"10

You can also create a list of things to do, such as figuring out ownership of blighted properties, warning owners of blighted homes about fines, creating a community asset such as a park, calling 311 to report properties, helping residents buy properties next to theirs, advocating for research on adjudicated properties, mapping your assets and people you have to help fight blight, and ground leasing a property from its owner.10

**Organize a Property Campaign:**

"Fighting blight on the scale of whole neighborhoods requires residents to combine the diligent reporting and tracking of a property through the code enforcement process with the political power of an organized community. In 2008, the Freret and Milan neighborhoods did just that, conducting a neighborhood-wide property survey. They worked with property owners and city officials to help target blighted properties strategically, utilizing a Community-City Hall dialogue to address the high incidence of blight in the neighborhood. The effort is ongoing; the Property Campaign re-surveys all properties on a yearly basis to track improvement and re-focus their effort."30 Below is the Freret Neighborhood Center's "Starting a Blight Campaign in Your Neighborhood" step-by-step guide. These steps can be applied in any New Orleans neighborhood.

1. **Develop relationships with your neighbors:** They are most likely affected by the same issues and have similar concerns as you do. Talk to as many people as you can, gathering information on their concerns and specific properties they worry about. You can seek people out in parks, churches, schools, other community spaces, or go door-to-door. Invite community members to a campaign meeting.30
2. **Gather people together to identify common concerns:** At the meeting, ask what specific concerns attendees have. Allow everyone to introduce themselves and express their unique concerns. As a group decide what items are the most pressing and should be tackled first. Collect phone numbers and possibly email addresses from everyone for future contact.30

3. **Start with tackling a goal that is winnable and measurable:** An example of such a goal is "requesting an immediate inspection by the building inspectors." This is "winnable" because inspection is required by law, and "measurable" because you can set a time limit on how quickly you want the inspection completed. Figure out who the right “target” is for tackling your goal. The target is that person, or people, who have the means to resolve the issue. For example, a target may be the city inspectors, planning commission, or even the owner of the property. "Remember targets are neither good nor bad. They are potential allies or potential roadblocks, depending on their reaction to your request."30

4. **Develop a petition to gather more support from neighbors:** Once a few members of the community have come together to make some small decisions, it is time to expand your efforts. Recruit more residents to your campaign by creating a petition for people to sign. Have original meeting attendees bring the petition around their social groups and explain to neighbors what you are petitioning for. Be sure to give those who sign some type of flier to keep, describing the cause and when the next meeting will take place.30

5. **Practice before your meeting with the appropriate "target":** You can now begin practicing what it will be like to meet with your target group, whether that be a government official, an agency, or someone else. Whomever you choose, should be able to help you meet your goal. You will need to decide who your spokesperson will be before meeting your target, with a backup in mind just in case. Be sure to arrive at and leave the meeting as a group. You should also debrief immediately after the meeting's close to make sure everyone is on the same page and form a plan to move forward. When your target comes to you for a meeting, print out copies of the agenda and thank them for going out of their way to meet.30

6. **Revise, modify, or grow your plan:** After meeting with your target, you most likely will have gained some new information. This information could be from or about your target. In some cases they may be reluctant to contribute to your campaign or they may provide you with information indicating your campaign was headed in the wrong direction. Use all knowledge gained to revise your plan. If the target is unwilling to contribute, you may need to look elsewhere for support. It is time to grow your plan if you have won or accomplished your first goal. Regardless of the meeting outcome you must:

   - Debrief to evaluate your plan
   - Make a decision to revise, modify, or grow your plan
• Decide what issue to tackle next, when your current issue gets resolved
• Go back to step #1 and circulate through the process again

7. Grow your neighborhood organizing team: "Whether you win or lose your first issue the first time out of the gate, remember that growing connections between neighbors and keeping a consistent rhythm of meeting, deciding, communicating, and debriefing is key to building a strong campaign." It is important to rotate leadership within the campaign to avoid overworking volunteers. Continue to recruit new volunteers to help and keep talking to new people.

For additional information on organizing property campaigns, visit the Freret-Milan Property Campaign website at http://www.nhsnola.org/site113.php. Training material for campaigns can be found on the Freret Neighborhood Center's site accessible here: https://sites.google.com/site/fncnola/property-campaign.

The real estate market:

Understanding the real estate market is a critical part of tackling blight. The best path to take will largely depend on the climate of the current market. This section will provide you with a basic understanding of how the market works and how to determine the type of market in your neighborhood.

How does the real estate market work? "Your property will have an assessed value that is calculated by the assessor to determine your property taxes. A more accurate measure is your property’s appraised value a real estate "appraiser" will estimate the value of your property based on similar properties that have been sold recently. The real estate market is based on property values which are determined by how much properties are being bought and sold for in a property area."10

What are the types of real estate markets? There are three main types of markets including: "soft market" (mostly low property values), "transitional market" (property values increasing, some high, some low), and "strong market" (mostly high property values). "Real estate market "types" are based on property values. Blighted properties look the same in any area, but your local market type affects how you deal with them."10

Why does the market affect blighted properties? "In soft markets, low prices mean less building and more blight. In strong markets, speculators may hold onto vacant properties without maintaining them."10

1. Soft markets (breaking the cycle of blight): The low property values from blighted properties makes the development of new businesses and homes quite difficult. Properties may have been vacant for a long time and have "back taxes, clouded titles, or other issues." There is a need for policies that can help "break the cycle" through proper maintenance of properties or the return of properties to use with
low cost. "In soft markets, "break the cycle" of blight by finding policies that allow neighbors, farmers, gardeners, or the City to maintain or use properties at low cost."10

2. **Strong Markets** (stopping speculation): "In strong markets, speculators may hold on to blighted properties in the hope of selling them for more money as property values increase."10 There is a need "to fine owners who don't maintain property, and hold auctions to return properties to commerce. Once returned to commerce, high property values mean new homes and businesses will come in. In strong markets, focus on policies that fine speculators who don't maintain property, and on auctions that can return properties to commerce."10

3. **Transitional Markets** (combination of soft and strong): "Transitional" markets have both soft-market areas and strong-market areas. There is a need for "code enforcement fines, and more chances for neighbors to use land productively. Example: In St. Roch, property values are increasing; but much vacant land has high back taxes or clouded title, making it hard to access and driving prices up. Transitional markets need a combination approach - they have both soft-market areas and strong-market areas."10

"To find out about local markets, there is a new tool called the New Orleans Market Value Analysis (MVA). Roughly, orange and red areas are "soft" markets, yellow and blue areas are "transitional" and purple areas are "strong" markets. Make sure to check what the MVA says against your local experience. You can use the MVA to start to understand your area's real estate market. Public MVA maps and documents are on the website [https://data.nola.gov/](https://data.nola.gov/)."10 Another good organizing and identification tool is located here: [http://nolablighttoolkit.com/wp-content/uploads/2014/06/Worksheet-3_MarketAnalysis_NOLA_BOT.pdf](http://nolablighttoolkit.com/wp-content/uploads/2014/06/Worksheet-3_MarketAnalysis_NOLA_BOT.pdf)

**Best policies for your market:**

**Issues to address with policy:**

1. Physical problems (improve safety and health): Dilapidated and dangerous buildings, overgrown lots, illegal dumping, rodents or vermin.

2. Property ownership (transfer neglected property): Clouded property titles, large amounts of back taxes, large amounts of back taxes, speculators or absentee owners who do not maintain property.10

"Policies can focus on dealing with immediate physical problems, on transferring property out of neglectful owners’ hands, or on both."10

"The legal definition of "blight" in Louisiana is a property that meets the following conditions: have been reported and put through official code enforcement process, found guilty at a code enforcement hearing, and poor condition not fixed within 30 days."10
Which policies and tools work best for your market?

1. Soft Markets (low property values): Adjudication (to remove high back taxes), research on city charter, tax sale (best for creating green spaces without clear title), code enforcement (with maintenance programs), and ground leases.

2. Strong Markets (high property values): Code enforcement fines (to force owner clean-up or sale to new owner), Sheriff’s sale auctions (for 2/3 property value plus all taxes and liens), and ground leases.10

"Key point: Policies that use auctions to bring properties "back to commerce" work well in strong markets. In soft markets, these can promote speculation, helping community-based residents and organizations eliminate taxes and gain clear title is more important."10

Blighted property repair:

Maintenance and upkeep of a blighted property:

Wanting to fix blighted homes in your community is a great thing, however if you lack knowledge or are inexperienced in home repair, you will not get very far. Use the following information to help guide you through the process, using your time and resources in the most efficient way.

"The most important concern when dealing with a blighted property is to prevent damage until reconstruction has started in order to protect your home and your neighborhood. Keep the following steps in mind:

1. Secure the property: Board up all entryways including doorways, windows, and holes to prevent humans and animals from entering your home. Uninvited humans and animals can cause additional damage to your home and create a public safety issue for your neighborhood. It is better to use screws rather than nails when securing your home so that the boards cannot be easily ripped off.16

2. Remove Wet Materials: Due to the hot and humid climate, it is important to remove materials that hold water. These can harbor mold and quickly damage additional parts of the structure, creating unsafe conditions. Before removing any materials, it is important to thoroughly photograph all damage to the property. Many agencies, including Road Home and insurance companies, require ‘before’ pictures to prove the extent of damage. Porous materials should be disposed of first. These include carpet, ceiling tiles, drywall, insulation, and clothed items. Some items, such as wood, metal, and/or plastic, may be saved, depending on the amount of mold. If salvageable, these items will need to be cleaned with a strong disinfectant. Simply painting over the materials will not work because the mold spores will not be killed—mold will continue to grow and the paint will peel off soon after."
3. **Landscaping:** Climbing vines (such as cat’s claw) can grow quickly, accelerate deterioration of a home, and lead to structural damage if left unchecked. Regular landscaping will hinder the growth of damaging vines as well as help prevent infestation of vermin and insects, maintain the exterior of the home, and help keep nuisance letters at bay.

The City Council’s guide to Housing Code Enforcement outlines the basic standards for building and property maintenance standards required by the City Code. The guidelines in the handbook describe the requirements for ensuring that your property’s outside walls and features, roofs, yards and lots, other structures on lot, doors, and windows stay in compliance with New Orleans building code. Complete text can be found at [http://www.nolacitycouncil.com/docs/resources/HousingCodeHandbook.pdf](http://www.nolacitycouncil.com/docs/resources/HousingCodeHandbook.pdf).

Properties that are found to be in violation of these standards can be reported to code enforcement. If the property owner does not comply with code during the inspection and hearing process and there is sufficient evidence to render a ‘public nuisance’ or ‘blight’ judgment against the property, Code Enforcement can level liens against the property. The City can now levy up to $1000 per violation. Properties will be subject to additional daily fines that begin after 30 or more days if the property is still not in compliance with City Code. Find non-profits that offer home renovation or individual home beautification services among those listed at the end of this guide.¹⁶

4. **Legal Resources (Clear Title Issues):** Many homeowners who have blight judgments rendered against their property often find themselves without clear title to homes they’ve been living in for years. There are community and non-profit resources that take special care to address this problem, given its prevalence in New Orleans.

The Louisiana Appleseed Network has published a brief guide explaining the importance of establishing clear title to heir property. An electronic version of their six-page handbook can be found online at: [http://www.appleseednetwork.org/wp-content/uploads/2012/05/Protect-Your-Property.pdf](http://www.appleseednetwork.org/wp-content/uploads/2012/05/Protect-Your-Property.pdf).
Past transaction and contracts for the property in question can be accessed at the Notarial Archives. The Notarial Archives is a government agency that files and maintains land records and other contracts recorded in Orleans Parish. The Notarial Archives offices are located at 1340 Poydras Street, 5th floor.

To conduct a transfer, act of sale, or act of donation on a property, all parties must be present to file the application at the City of New Orleans Conveyance Office at 1340 Poydras Street, 4th floor. Additional information can be found at http://www.orleanscivilclerk.com/ or by calling (504) 407-0007.

5. **Hiring a Reputable Contractor:** Contractor fraud is a prevalent problem in areas affected by disasters. In order to prevent contractor fraud, use the resources available from the Louisiana State Licensing Board for Contractors found at http://www.lslbc.louisiana.gov/ You can also find a reputable contractor through the Home Builders Association of Greater New Orleans at http://www.hbagno.org/ or by calling (504) 837-2700. Keep the following in mind when selecting a contractor:

Hire only Louisiana State Licensed or Registered contractors.

- Commercial Projects over $50,000 require state license
- Residential New Construction of Single Family Homes require state license
- Home Improvement/Remodeling over $1,500 requires state registration
- Hazardous materials or mold remediation over $1.00 requires state license

Verify Contractor Licenses or Registration numbers.

- Call 1-800-256-1392 or visit http://www.lslbc.louisiana.gov/ and search for contractor license/registration number.

Get second and third opinions.

- Get at least three local area references and review the contractor’s experience.
- Get at least three bids on the work to be performed.

Get a written contract.

- Don’t sign anything until you understand the terms of your contract clearly.

Track payments.
• Pay 10% down, or $1,000, whichever is less, depending on project size and reasonable starting cost requirements.
• Don’t let payments get ahead of work completed.
• Keep a record of all payments.
• Don’t make the final payment until you are satisfied with the job.
• Never pay cash.
• Keep a job file of all papers relating to your construction project.”

Dealing with contractors:

Request a copy of the following:

• “Applicable Licenses: The license needed depends on the type of work being done.

• General Liability and Workers Compensation Insurance: Check to ensure that the insurance policy will remain in effect until the end of construction.”

Ask the following questions:

• Do you have a physical office address?
• Do you guarantee your work?
• Have you or your company been a party to any construction-related litigation within the past five years?
• Will you provide me with a written lien waiver?
• Will you obtain all the required building permits?
• How is cleanup handled?
• How will you protect my home?
• How many projects like mine have you completed in the past year?”

Building Permits:

The City of New Orleans requires that permits be filed with the Office of Safety and Permits for the following actions when rehabilitating a home.

• New construction
• Structural repairs
• Non-structural renovation
• Demolition
• Electrical work
• Mechanical work”

Note on demolition permits:

"If your property is located in the Neighborhood Conservation District, a demolition permit from the Neighborhood Conservation District Committee is required. More information about Demolition Permits, including the boundaries of the NCD, can be found at: http://www.nola.gov/onestop/building/demolition/demolition-permit/ and in the user guide at the bottom of that page. For more information about special permits in historic districts, see the ‘How are Homes in Historic Districts Affected?’ section. Applications for permits and the schedule of fees can be found at http://www.nola.gov/onestop/building.” (See ‘One Stop Shop’ in "Other Major Key Resources" for additional information.)

Construction management:

"Although plenty of New Orleans property owners need contractors for maintenance, renovation, and wholesale construction work, not many know the ins-and-outs of working with a contractor. Don’t let this lack of comfort and/or technical knowledge prevent you from getting the necessary work completed on your property.

Some organizations offer construction management services, acting as advisors to help protect homeowners from fraud and miscommunication. Construction project management (CPM) is the overall planning, coordination and control of a project from development to completion. Depending on the house, many homeowners hire third-party construction managers to coordinate and expedite the work between architects, material suppliers and construction crews.”

"Construction projects normally follow a logical sequence, similar to the following:

• File permits
• Work on structure and/or foundation
• Roof work
• Environmental treatments including lead, asbestos, mold, termite, etc.
• Exterior carpentry
• Rough framing
• Rough MEPs (Mechanical, Electric, Plumbing)
- Framing inspection (open wall)
- Insulation
- Drywall
- Interior paint
- Flooring
- Cabinets/Countertops
- Trim carpentry (Baseboards, Molding, Doors, etc.)
- Trim MEPs (Mechanical, Electric, Plumbing)
- Final inspections (Closed Wall)
- Certificate of Occupancy
- Release of electric, gas, and water meters"16

**Homes in historic districts:**

*How are homes in historic districts affected?*

"The Historic District Landmarks Commission (HDLC) is the City’s regulatory agency for local Historic District Landmarks Commissions outside of the Vieux Carre. The HDLC preserves the historic characteristics of neighborhoods and offers assistance to owners to ensure that any changes to the exterior are appropriate to the architecture of the building and the character of the district. The regulations provide for a design review process that allows for pre-application conferences.

An HDLC-issued Certificate of Appropriateness is required for work on the exterior of all buildings located within local historic districts and for individually-designated landmark buildings. Categories of exterior work include repairs, alterations, additions, demolition, relocation, new construction, and site work such as fencing or paving.16

New Orleans Historic Districts cover the following areas (excluding the French Quarter, which is covered by the Vieux Carré Commission):

- St. Charles Ave. corridor between Napoleon Ave. and the CBD
- Irish Channel & Garden District
- CBD and Warehouse District
- Canal Street adjacent to the French Quarter
- Algiers Point
- Marigny & Bywater
• Holy Cross
• Treme
• Esplanade Ridge

Check the map at http://www.nola.gov/hdlc/map/ or search for a specific property by address at http://property.nola.gov to see its historic district status.

"If your property does fall within a historic district, exterior renovation will need a Certificate of Appropriateness and must comply with the following process:

1. Application: All work proposed must begin with filling out a Master Building Permit Application. Depending on the type of work, drawings may be required. The HDLC encourages drawings to be submitted in an electronic format. Drawings larger than 11x17 in. must be submitted electronically.

2. Review Process: the plans examiner will review the application and if the work can be approved at the staff level, a Certificate of Appropriateness will be issued. The normal waiting time for applications which can be approved by the staff ranges from 6-10 weeks.

3. Architectural Review Committee Meeting: If the work proposed requires approval from the Architectural Review Committee (ARC), the plans examiner will let the applicant know the date and time of the meeting. The applicant/owner is required to attend the meeting to make sure all issues are discussed.

4. Commission Meeting: sometimes a project needs the approval of the full Commission. These projects usually involve demolition, new construction, or the retention of work done in violation.
5. Certificate of Appropriateness: once the project receives all the necessary approvals, a Certificate of Appropriateness (C of A) will be issued by the HDLC. Once a C of A is issued, the applicant may obtain a building permit if needed. Although a Certificate of Appropriateness is required by the HDLC for the following work, no permit is required from the Department of Safety and Permits:

- Removal and replacement of deteriorated weatherboards, aluminum or vinyl siding
- Removal and replacement of deteriorated floor boards
- Removal and replacement of deteriorated porches and steps - front, rear and sides, when not in conflict with the Zoning Ordinance
- Paving of yard
- Retaining walls which are not over three (3) feet in height
- Exterior painting when not requiring protective scaffolding over public property
- Roofing and/or gutter work with respect to one and two family dwellings
- Fences up to seven (7) feet in height. - Exemption from the permit requirements of this Code shall not be deemed to grant authorization for any work to be done in a manner in violation of the provisions of this Code or any other laws or ordinances of the City of New Orleans including Vieux Carré.
- Commission and Historic District Landmarks Commission requirements”

"Note: The painting of a building does not require a CoA unless it involves the painting of a previously unpainted brick surface, or the painting involves caulking and/or changing of weatherboards.”

Opportunities for community involvement:

The community can and should be involved in the process of fighting blight. There are opportunities to work with the local government, NORA, and other community organizations also working on blight reduction.

Working with Government organizations:

The city government needs community organizations like yourself to maintain a connection with blighted neighborhoods. They want to work with you, as you offer the connection they are seeking. You can provide insight into what the community needs most and how to best
accomplish that. In order for this relationship to work, there need to be open lines of communication between the government and community organizations. Greater transparency and community involvement on the city’s end would go a long way.

1. **BlightSTAT:** Every month the City of New Orleans holds BlightSTAT meetings where city "leaders and managers review performance results related to Mayor Landrieu’s strategy to reduce blighted units by 10,000 by the end of 2014. Managers use the data from BlightSTAT to identify solutions, make adjustments, and improve overall performance. In BlightSTAT, the OPA (Office of Performance and Accountability) works with departments to develop performance measures and targets, prepares the analyses and reports, coordinates the public meetings, and follows up on identified action items to improve performance." Specific departments that present data and analysis at these meetings include The Department of Code Enforcement, The Office of Community Development, The Office of Information Technology and Innovation, The Law Department, and The New Orleans Redevelopment Authority. The BlightSTAT meetings are open to the public and offer a good way for organizations to get involved. The meetings are designed with the intention of getting feedback from the community on what works and what does not. Those running the meetings also hope to gain insight for improvement of departments and agencies. It is encouraged that citizens attend these meetings to ask questions and give their thoughts on how the City’s blight reduction programs can be improved. Meetings help hold officials accountable for their progress and track results. The meetings are held every second Thursday of the month beginning at 8:00 a.m. in the 8th floor conference room at City Hall. To see all prior BlightSTAT reports visit the following site: [http://www.nola.gov/performance-and-accountability/reports/blightstat/](http://www.nola.gov/performance-and-accountability/reports/blightstat/)

2. **Purchasing Housing and Urban Development (HUD) homes:** As a non-profit you have "the opportunity to purchase HUD homes at discounts up to 30 percent under the direct sales program. With this discount, local nonprofit organizations invest in their communities through property rehabilitation and resell to first time homebuyers and low to moderate-income families. The Federal Housing Association (FHA) also offers nonprofit agencies favorable FHA insured mortgage financing terms and opportunities for down payment assistance programs."31

3. **Fannie Mae:** "In order to obtain control of vacant houses, neighborhood stakeholders can purchase houses owned by the Federal National Mortgage Association (Fannie Mae). Homes that have a mortgage in which Fannie Mae is the primary investor and go through the mortgage foreclosure process become Fannie Mae owned homes. Anyone, including individuals, block clubs, neighborhood organizations, faith-based organizations, and CDCs, may purchase a house owned by Fannie Mae."13
Working with NORA:

The New Orleans Redevelopment Authority is the main authority for blight in the city, while also a government agency. Community organizations must work with NORA to accomplish certain tasks around blight. Just like other government departments, NORA needs community assistance to carry out effective blight reduction strategies. Developing a strong relationship with NORA is therefore mutually beneficial. The information below gives a little more detail on how NORA operates and where you can get involved as a community organization.

- **Requests for Proposals**: "NORA handles all requests for proposals (RFPs). RFPs will represent individual projects and will state required deadlines, funds available to complete the project, as well as other project requirements. Applicants will be evaluated via a set of programmatic criteria using a predetermined score card. Finalists will also be subjected to a financial underwriting to determine the size and terms of assistance." Proposal requests can be found at: [http://www.noraworks.org/rfps](http://www.noraworks.org/rfps)

- **Search of adjudicated property**: "To perform a search of adjudicated property, visit the Parish of Orleans Civil District Court Conveyance Office. The Conveyance Office is a government agency that registers all transfers of real estate and other land records in Orleans Parish."

- **Property Lien**: "If a property owner fails to maintain his or her own property in accordance with city codes, the owner can be fined by the city for violation of city codes. If the fines are not paid, they can become liens against the property. Liens are like mortgages and can be foreclosed upon." As a community organization you can help assist property owners facing a lien through the waiver process below.

- **Property Lien Waiver**: "The City of New Orleans Project Lien Waiver was created to assist property owners in restoring blighted and substandard property to commerce. The Lien Waiver Committee works with the owners of blighted and substandard property in removing city code violation fines and liens that have been placed against their property, if they renovate it."

"A lien waiver could be granted if a property owner meets one or more of the criteria below:

- Property has been renovated and is up to code
- Property purchased through expropriation by the New Orleans Redevelopment Authority (NORA)
- The lien was improperly assessed
To apply, contact the New Orleans Office of Public Advocacy to receive a lien waiver claim form. Participants will also need to bring the following documentation:

- Recent city tax bill obtained from the Treasury Department in Room 1W38 of City Hall, 1300 Perdido Street, New Orleans, LA 70112
- Photographs of the property
- Letter from your lender that your loan would be approved if your property were lien-free
- Legal documentation transferring ownership to you or agreement to purchase
- HUD-1 settlement statement from when you purchased your property

Working with Community Partners:

The Blight Resource Guide 2014, by the Committee for a Better New Orleans and the Greater New Orleans Housing Alliance, offers a list of community organizations that help fight blight along with services they offer. Services include anything from demolition and renovation to legal services and credit counseling. These groups are listed below by neighborhood.

1. **Broadmoor**
   - Broadmoor Development Corporation
   - Global Green USA

2. **Central Business District**
   - Louisiana Appleseed
   - Preservation Resource Center
   - Pro Bono Project
   - Rebuilding Together New Orleans
   - Southeast LA Legal Services

3. **Central City**
   - Associated Neighborhood Development
   - Harmony Neighborhood Development
   - Neighborhood Development Foundation
   - United Saints Recovery Project
4. Faubourg Delassize/Faubourg Livaudais
   • Jericho Road
5. Freret
   • Freret Neighborhood Center
   • Neighborhood Housing Services
6. Gentilly
   • Beacon of Hope Resource Center
   • Dillard University CDC
   • Habitat for Humanity
   • Project Home Again
   • Project Homecoming
   • St. Paul’s Homecoming Center
7. Hoffman Triangle
   • Urban Impact Ministries
8. Lower Ninth Ward
   • Common Ground Relief
   • Lower Ninth Ward CSED
   • Lower Ninth Ward Homeowners Association
   • Lowernine.org
9. Mid-City
   • Committee for a Better New Orleans
10. New Orleans East
    • Camp Re-store
11. St. Bernard Parish
    • St. Bernard Project
12. St. Claude
    • Build Now
13. St. Roch
    • Rebuilding Together New Orleans
14. Seventh Ward
• Youth Rebuilding New Orleans

15. Tulane/Gravier

• HandsOn New Orleans

"Some examples of neighborhood groups that have done excellent work in creating blight monitoring systems are the Beacon of Hope Resource Center in the Lakeview and Gentilly neighborhoods, as well as the Broadmoor Improvement Association. Beacon of Hope Resource Center uses a highly engaged volunteer staff to monitor neighborhood properties, as well as Geographic Information Systems (GIS) technology to track blighted and vacant property in their community. Similarly, the Broadmoor Improvement Association has used mapping technology to locate vacant properties and to monitor their neighborhoods recovery.

If your organization locates a property you think is blighted, you can contact the local neighborhood association near the property to find the property's history and about acquisition. You can ask them questions on ownership and potential development site."

The City of New Orleans hosts several days throughout the year which aim to promote community involvement and alleviate the most visible blight issues around schools and playgrounds. There are five "Fight the Blight Days" and six "NOLA FOR LIFE Volunteer Days" throughout the year. Both events offer great opportunities for your community organization to get involved.

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Funding for blight:

Acquiring funding:
Office of Community Development (OCD): This office "manages federal grant money given to New Orleans by taking, selecting, and distributing funds to local service providers. The OCD does not provide individuals money to repair or restore their homes."32 This department could be useful to your community organization through the HOME Investment Partnership Act. The act is one of several funding programs the office oversees.

HOME Investment Partnership Act (HOME):

- "Purpose - To provide resources to meet the housing needs such as Rental and Homeowners Rehabilitation Programs, Affordable Housing Programs, and Minor Home Repair Programs.

- Geographic target - Orleans Parish CD Neighborhoods with 51% low-to-moderate income persons.

- Eligible activities -
  
  o Acquisition, rehabilitation, conversion, lease and repair of existing facilities to provide housing and services. Applicants who wish to do rehab for independent living will need to fill out the HOME/CHDO application.
  
  o Operating costs for housing including maintenance, security, operation, insurance, utilities, furnishings, equipment, food, supplies, and other incidental costs. Salaries for personal care attendants and other housing staff directly related to the operation of the facility should be included here. Supportive services provided at housing facilities including but not limited to health care, case management, drug and alcohol abuse treatment and counseling, and mental health services are not included as part of this NOFA. Supportive services are funded through the Ryan White CARE Act, Titles I and II, UNITY of Greater New Orleans, and the State of LA - HIV/AIDS Program.
  
  o Short-term rent, mortgage, and utility payments to prevent the homelessness of the tenant or mortgagor of a dwelling are eligible. Short-term assistance cannot be provided for a period longer than 21 weeks in any 52-week period. Agencies must demonstrate that they will coordinate with other agencies providing short-term assistance in order to avoid duplication of services. Only one agency may receive funds for Short-term Rental/Mortgage/Utility Assistance activities in this category.
  
  o Project or tenant based rental assistance, including assistance for shared housing arrangements.
Housing information services including, but not limited to counseling, information, and referral services to assist an eligible person to locate, acquire, finance and maintain housing.32

The application process can be found here - http://www.nola.gov/community-development/programs-and-funding/application-process/ and is described below.

**Funding application process:**

1. *Notice of funding availability issued:*

"The City of New Orleans issues a Notice of Funding Availability (NOFA) federal formula grants awarded to the City of New Orleans by the U.S. Department of Housing and Urban Development (HUD). These grants include Emergency Solutions Grants Program (ESG/SESG), and Housing Opportunities for Persons with AIDS (HOPWA).

Only organizations certified on the Registry of Neighborhood Organizations are eligible to receive funding under this NOFA. The Notice of Funding Availability will include application and due date. All applications must be complete in order to be considerate for review."32

2. *Applications due:*

"Application packets are available in MS Word format from the Office of Community Development, and will be posted online when available. All applications must be complete in order to be considered for review. Unless an exhibit is labeled “if applicable,” you must submit all required exhibits. Proposals must be complete at the time of submission. No addenda will be accepted after the deadline date for submission of proposals unless specifically requested by the Review Panel."32

3. *Application review:*

"Applications are reviewed by the Office of Community Development to ensure that they meet the following requirements:

- Fully completed accompanying application to be a registered organization with the Office of Community Development.
- Eligible population and target area for funding source
- Eligible activities for funding source
- Organizations are in compliance with applicable civil laws and Executive Orders regarding fair housing and equal opportunity."32
4. Application scoring:

"Applications will be scored against a standard set of criteria. The following core selection criteria apply to the continuum of care components of the NOFA:

- Needs Assessment & Target Population
- Agency Background and Experience
- Coordination and Collaboration
- Approach to Providing Services
- Financial"

5. When applicable, currently/previous funded agencies evaluated:

"Currently funded agencies or agencies who have received prior funding will also be evaluated on past performance in carrying out programmatic activities and contractual compliance. Factors considered will include:

- Agency ability to meet service delivery goals
- Timely expenditure of funds
- Timely reporting
- Accuracy of reporting
- Ability to meet audit requirements
- Attendance at meetings"

6. Notification letter:

"The City of New Orleans will notify conditionally-selected applicants in writing. Notification of award is not a guarantee of funding. Award letters will include conditions of award that must be met prior to the receipt of funding.

As necessary, the Office of Community Development will request conditionally-selected applicants to submit additional project information. Applicants will also be notified of the deadline for submission of such requested information. If an applicant is unable to meet any condition of grant award within the specified time frame, the City of New Orleans reserves the right to rescind the notice of award and to use available funds for other applicable programs."
7. Reports required from funded agencies:

"Awardees who have gone through the funding application process and received conditional awarding of monies will be required to submit the following reports:

- Monthly Programmatic Services/Direct Benefit Reports
- Monthly Program Income Reports (as applicable)
- Monthly Cost Control Statements
- Section 3 Reports
- Contractor/Subcontractor Activity Reports
- Report of Matching Funds
- Annual Reports
- Other – Reports as Requested by OCD

Reports must be submitted with the required level of detail in a timely manner. Reporting requirements must be strictly followed. Failure to comply may result in the discontinuation of funding and/or the termination of contracts."

32
References:


Chapter 15: Health of the Community

Community design and public health:

As an organization operating within a community, you have the power to improve your community's health. This can be accomplished in a variety of ways. Some areas to consider focusing on include: walkability and bikeability of streets, increasing physical activity, improving healthy food access, and tobacco control. There are many more areas you might work on to promote a general culture of health in your community, or you may focus in on a specific component of one just mentioned. Below are details on some key areas of public health.

1. Walking and biking in America

Almost 25% of trips made in the United States are one mile or less, however 75% of those trips are made by car. Within the last 20 years, trips made by walking have gone down by 42%.\(^1\) Compared to other countries around the world, "the United States has the least walkable cities and the lowest rate of walking as a means of transportation."\(^1\) Relying on automobiles for most transportation has a negative impact on health.\(^1\) The Surface Transportation Policy Partnership compares health research to transportation data to illustrate this connection. "They found that in metropolitan areas where people walk less, the prevalence of being overweight is greater."\(^1\)

The organization Advocacy Advance works on efforts to expand biking and walking availability in cities throughout the country. The state of Louisiana actually has dedicated funding for bike and walking projects. These projects are funded through "share the road" license plates, the Louisiana Bicycle and Pedestrian Safety Fund, and severance fees.\(^2\) Severance fees are "charges levied on operators in the natural resource extraction industries such as coal, timber, or stone. These heavy industrial companies are usually located in remote areas of natural resource-abundant states, where the heavy vehicles they use cause the vast majority of damage to roads. The fees can therefore cover most of the system's disrepair."\(^2\) As an organization you could look into attaining some of those dedicated funds for your projects.

Many groups of people rely on walking as their only form of transportation. Groups such as the elderly, children, disabled, and those of low socioeconomic status, cannot afford to use alternative transportation or do not have access to it. Therefore it is critical that cities have safe walking paths and sidewalks. Additional benefits to improving walkability and bikeability include: better air quality, increases in road safety, reduction of municipal infrastructure costs, and possibly even a decrease in depression.\(^1\) "To develop relevant
policies and effective interventions, it is necessary to identify what changes to the built environment support people's ability to walk and bike.1

Relevant resources:

- Advocacy Advance: www.advocacyadvance.org
- The Surface Transportation Policy Partnership: transact.org
- Bike lanes, projects, and advocacy efforts in New Orleans: http://bikeeasy.org/
- Walking trails in the recreation section called "jogging and recreation": www.neworleansonline.com
- City Park paved trails under the "walk, bike, run" section: https://neworleanscitypark.com

2. Increasing Physical Activity

Your organization can increase community physical activity by improving walkability and bikeability in the neighborhood as a whole. It has been shown that people with access to sidewalks and trails are more likely to be active. If people live within walking distance to stores, they will be more likely to walk to them. Good street connectivity also positively influences walking (this means more intersections and blocks, streets that are calm, narrow, complex, and visually interesting). The more people have access to safe walking
and biking spaces, the more they will use them (exercise). Other ways to help increase physical activity of community members include the following:

- Promote use of public parks, playgrounds and New Orleans Recreation Development Commission (NORDC) recreation centers and activities in your neighborhood
- Promote the use of free exercise classes (like those offered through the Fit NOLA Park program) or start exercise classes (get funding to provide low or no cost attendance)
- Host outdoor activities for members to attend (partner with other organizations to join resources)
- Encourage companies and small businesses to provide physical activity incentives for their employees

Fit NOLA is a multi-sector city-wide initiative to make New Orleans one of the top 10 fittest cities by 2018. Led by the City of New Orleans, the Fit NOLA Partnership has brought together 100’s of likeminded organizations across the city to develop strategies to make it easier for all New Orleanians to live healthy active lives. They host and promote a number of free programs and events around the city in which your organization could participate. They maintain a regularly updated calendar of events, active Facebook page and distribute a newsletter twice a month containing upcoming events, opportunities to get more involved and highlighting community partners.

Additional relevant resources:

- NORDC programs, parks, booster clubs, etc.: [http://www.nola.gov/nordc/](http://www.nola.gov/nordc/)
- Fit NOLA Parks: [http://www.nola.gov/nordc/fit-nola-parks](http://www.nola.gov/nordc/fit-nola-parks)
- Fit NOLA Calendar of Events: [http://www.nola.gov/health-department/fit-nola/](http://www.nola.gov/health-department/fit-nola/)
- Fit NOLA Partnership Shared Action Blueprint: [http://www.nola.gov/nola/media/Health-Department/Healthy%20Lifestyles/Fit-NOLA_Book.pdf](http://www.nola.gov/nola/media/Health-Department/Healthy%20Lifestyles/Fit-NOLA_Book.pdf)
- Fit NOLA Facebook Page: [https://www.facebook.com/FitNola](https://www.facebook.com/FitNola)
3. Improving Healthy Food Access

*Why is eating healthy important?*: "Obesity is a known risk factor for cardiovascular disease (CVD), as well as many other serious health problems. Improving diet quality can play an important role in CVD and obesity management while reducing the associated health risks. It is increasingly important for individuals and organizations to come together to work on a community-wide approach to promoting healthy, active lifestyles."¹

*What is eating healthy?*: One of the key tenets of healthy eating is increasing intake of fruits and vegetables. This is associated with lower risk of coronary heart disease, stroke, and some cancers, lowering blood pressure and LDL cholesterol. People do not eat nearly enough servings of fruit or vegetables. A large economic benefit of eating local fruit and vegetables is increased money for the city. There will also be less money spent on healthcare in the long term if people eat healthier.¹ More information on healthy eating specifics will be provided later in this section.

*Ways to improve healthy food access*: There are several environmental changes your organization can make to your community to increase food access including "creation and use of community and/or school gardens and creation and support of local farmers markets."¹ Policy changes can also have a positive impact. New policies should encourage local farming and local procurement by schools, hospitals, and other businesses. Employers, schools, and churches can also commit to serving healthy local food.¹

*Community Greening*: This involves creating and maintaining community/school gardens and farmers markets. This can be beneficial by providing "a more livable environment by controlling physical factors such as temperature, noise, and pollution. They help create a community image that is perceived as positive by both residents and outsiders. They create
opportunities for people to work together, be physically active regularly, and improve their community."¹ Other benefits include: "reduced crime, higher property values in greened areas, nutritious food from community gardens, and increased business activity in attractive green neighborhoods."¹

Community Gardening: For a garden to be sustainable it should grow food based on local conditions and reflect strengths, needs, and desires of the community. Continued participation and leadership is essential. Check out the resources below to learn more about community gardens in New Orleans.

- Backyard Gardeners' Network: http://backyardgardenersnetwork.org
- Go Green NOLA: http://www.gogreennola.org/communitygardens
- Hollygrove Market and Farm: http://hollygrovemarket.com
- Mid-City Community Garden: http://www.midcitycommunitygarden.com
- New Orleans Food and Farm Network: http://www.noffn.org
- Ninth Ward Community Garden: http://ninthwardcommunitygarden.com/site
- NOLA Green Roots: http://nolagreenroots.com
- Parkway Partners: http://parkwaypartnersnola.org
- Sankofa CDC: http://www.sankofanola.org
- Sprout NOLA: http://www.sproutnola.org
Farmer's Markets: This type of market is one where "farmer's, growers, and producers from a defined local area are present in person to sell their own produce directly to the public." Benefits to the community include:

- Extra local revenue
- Opportunity to interact with the person growing your food
- Access to the freshest, most nutrient packed produce
- Nutrition education
- Building a sense of community
- Fun weekly family trips

A mini market is when a community group procures fruits and vegetables from a local farmer, sets up a table, and sells produce at cost to community members. This is a great way to get fresh healthy food to those in low access areas. Places like churches, senior centers, and Head Start facilities are locations.

Greater New Orleans Area Farmer Market Resources:

- Camellia City Market: https://www.facebook.com/CamelliaCityMarket
- Covington Farmers Market: http://www.covingtonfarmersmarket.org
- Crescent City Farmers Market: http://www.crescentcityfarmersmarket.org
- Downtown Houma Market: https://www.facebook.com/DowntownHoumaMarket
- French Market: http://www.frenchmarket.org/farmers-market
- Freret Street Monthly Market: http://freretmarket.org
- German Coast Farmers Market: http://www.germancoastfarmersmarket.org
- Gretna Market: http://gretnafarmersmarket.com
- Grow Dat Youth Farm (Stand): http://growdatyouthfarm.org
- Hammond Farmers Market: https://www.facebook.com/HammondFarmersMarket
- Hollygrove Market and Farm: http://hollygrovemarket.com
- Marketplace at Armstrong Park: http://icdnola.org
- Rivertown Farmers Market (Kenner):
  http://www.kenner.la.us/pages/section_5_27.asp
- Sankofa CDC: http://www.sankofanola.org
- St. Bernard Seafood and Farmers Market: https://www.facebook.com/StBMarket
- Vietnamese Farmers Market: http://medianola.org/discover/place/1256
- Westwego Farmers and Fisheries Market:
  https://www.facebook.com/pages/Westwego-Farmers-Fisheries-Market/213131048714558
**Additional opportunities:** In addition to connecting community members with community gardens and farmers markets, you can also connect them to Community Supported Agriculture programs (CSAs) and local Food Co-ops. Hollygrove Market and Grow Dat Youth Farm both offer weekly CSA boxes throughout the year in New Orleans. There is also a local food co-op located in the Marigny neighborhood, called New Orleans Food Co-op, which provides fresh local food to residents. Find out more information at [http://www.nolafood.coop](http://www.nolafood.coop)

There are several tools available to assess the health of your community. Using these will help you best focus your efforts on areas in need of the most improvement. The Healthy Community Checklist (HCC) from the Michigan Healthy Communities Collaborative can be found at [www.mihealthtools.org/checklist/Healthy_Community_Checklist.pdf](http://www.mihealthtools.org/checklist/Healthy_Community_Checklist.pdf) or by going to their website [www.mihealthtools.org](http://www.mihealthtools.org) and clicking "preview the checklist." Another tool called the Nutrition Environment Assessment Tool (NEAT) can be accessed through [http://mihealthtools.org/neat/NEAT_Print_Version.pdf](http://mihealthtools.org/neat/NEAT_Print_Version.pdf) or through [www.mihealthtools.org/neat](http://www.mihealthtools.org/neat) and clicking "preview the NEAT." The coinciding action plan to use after completion of NEAT assessment can be located at [http://mihealthtools.org/neat/NEAT_ACtion_Plan_Print_Version.pdf](http://mihealthtools.org/neat/NEAT_ACtion_Plan_Print_Version.pdf).

**Incorporating health in your organization:**

The following are some quick tips and ideas on how to incorporate health into your organization.

- Serve healthy snacks at meetings
- Invite workers to prepare their healthiest recipes for organization parties and special events
- Pledge to go tobacco free as an organization
- Recognize positive health changes made by members. Examples are quitting smoking, weight loss, taking the stairs over riding the elevator, and adoption of good dietary habits.
- Provide members with resources to local healthy food providers (farmers markets, CSA’s, etc.) and links to physical activity outlets (gyms, parks, free fitness classes, etc.)
- Create organization policies that support and create a healthy internal work environment
- Bring in guest speakers to talk to the organization about healthy lifestyles
- Organize members to meet up and bike/walk to meetings together
- Engage organization members in community health outreach efforts
- Help organization members form exercise groups
- Consider creating an organization wellness committee to handle all internal organization health and wellness efforts.
General wellness tips:

Included at the end of this section is a sheet on general wellness for you to share within your organization and distribute out in the community. It provides a good overview of the various aspects of health including social health, mental health, physical health, and even financial health.4

DHHS Guidebook:

Introduction to the Dietary and Physical Activity Guidelines:

"Eating and physical activity patterns that are focused on consuming fewer calories, making informed food choices, and being physically active can help people attain and maintain a healthy weight, reduce their risk of chronic disease, and promote overall health." - Dietary Guidelines for Americans, 2010, Executive Summary.5

Community Leader's Role in Promoting Recommendations from the Guidelines: As a community leader you can play a vital role in getting people to a healthy weight and staying there. Through this process their risk of chronic disease development will decrease and they will be on the right path to living a healthy life. Using the Dietary and Physical Activity Guidelines set by the federal government will allow you to provide the most up to date scientific knowledge in an easy to understand fashion.5 You can find more information about them at www.ChooseMyPlate.gov

Key Points of the Guidelines:

1. Balancing Calories
   - Enjoy your food, but eat less.
   - Avoid oversized portions.

2. Foods to Increase
   - Make half your plate fruits and vegetables.
   - Make at least half your grains whole grains.
   - Switch to fat-free or low-fat (1%) milk.

3. Foods to Decrease
• Sodium - compare sodium in foods like soup, bread, and frozen meals, choosing those with less.
• Sugar - drink water instead of sugary drinks.

4. Physical Activity

• Adults should be active at least 2 hours and 30 minutes each week.
• Children need 60 minutes of activity per day.
• Stay active by walking, dancing, bicycling, gardening, and reducing time spent sitting.5

The two workshops attached are to be used within the organization to create healthy members, and also for use in your community. You might conduct a class for your organization first to make sure you have a handle on the material, and then host a workshop for interested community members. The first workshop is on healthy eating and the second focuses on physical activity.

Workshop #1

Making Healthy Eating Part of Your Total Lifestyle

This attached workshop is designed to be a guide for organizations to use to get their communities thinking about what a healthy diet consists of and provide basic nutrition knowledge. The workshop includes several handouts to help instructors lead the group and engage them in the topic. Handouts include: Eat Healthy Your Way, Go, Slow, and Whoa Foods handout, Tips for Using the Nutrition Facts Label, MyPlate, 10 Tips to Enjoying Your Meals, and a workshop evaluation.6

Workshop #6

Physical Activity is Key to Living Well

This attached workshop is designed to be a guide for organizations to use to get their communities thinking about physical activity, types of activity to regularly engage in, how to properly complete those activities, and help participants create a personalized physical activity plan. The workshop includes several handouts to help instructors lead the group and engage them in the topic. Handouts include: Be Active Your Way: A Fact Sheet for Adults, How Do You Stay Active, Muscle-Strengthening Exercises, My Aerobic and Strengthening Activities Log, How Many Calories does Physical Activity Use?, and a workshop evaluation.6
References:


GENERAL WELLNESS TIPS

SUPPORTING MEMORY THROUGH LIFE

What you do every day matters to your brain. The choices you make, levels of physical & mental activity, your social life, diet, & sleep habits can affect how well you perform in all areas of life.

TIPS TO SUPPORT A HEALTHY BRAIN:

♦ Write it down—put goals in writing to make them meaningful. Be sure to add what motivates you to achieve them.
♦ Give yourself a timeframe — you need enough time to work & master your goals.
♦ Physical activity — ask yourself: How did I work exercise into my day? Did I maximize my moving potential today?
♦ Cognitive stimulation — What did I learn today? What routine task did I approach differently today? Did I challenge my mind?
♦ Stress management—What caused me the greatest stress today? What triggered my stress? How did I relax?

*For the complete Action Plan for Brain Health go to: http://www.dana.org/uploadedFiles/The_Dana_Alliances/Documents/Your%20Brain%20at%20Work%20PDF.pdf

Social & Emotional Well-Being

Spiritual health can be defined as a connection of mind, body & spirit that requires an interconnectedness to a greater power, to all living creatures, & to our surroundings. It can provide a sense of meaning & purpose in our lives.

♦ Research has found that spiritual practices are important to overall health as they help to improve coping skills & social support. In addition, they can foster feelings of optimism & hope, promote healthy behaviors, reduce feelings of depression & anxiety, as well as support a sense of relaxation. These things positively influence immune, cardiovascular, hormonal, & nervous systems.

Mental health is defined by the World Health Organization as “a state of well-being in which the individual realizes his or her own abilities, can cope with the normal stresses of life, can work productively and fruitfully, & is able to make a contribution to his or her community.”

♦ Prevention of mental illness focuses on: the avoidance of risk factors.

♦ Promotion of mental health targets: the enhancement of an individual’s ability to achieve positive self-esteem, mastery, well-being; the utilization of relaxation methods & mindfulness; participation in healthy social activities & developing a strong support system. For more information check out: http://www.healthypeople.gov/2020/LHI/mentalHealth.aspx

Financial Health

Did you know? Scientific evidence has proven that stress can lead to health problems such as weight gain & high blood pressure.

A new study suggests that financial stress can be more harmful than other types of stress. In the study, financial & work stress were more likely to increase the risk for conditions that lead to metabolic syndrome, potentially leading to type 2 diabetes and/or heart disease.\(^{153}\)

Basic budgeting tips to help keep your financial stress low:\(^ {117}\)

- Save more & spend less
- Pay your credit card balance in full each month (only charge the amount you will be able to pay)
- Limit or avoid ATM surcharges
- Prepare for the unexpected
- Simplify your financial life (have checks directly deposited into accounts)
- Protect against fraud (watch for suspicious activity in bank accounts or suspicious signatures on checks and documents)

MyMoney.gov is a U.S. government website that provides basic financial education to all Americans. Visit the website for information on how to balance your checkbook, invest in your 401k, budget your money, & much more!\(^ {107}\)
Healthy Eating Guidelines

- Eat more vegetables, fruits, whole grains, fat-free or 1% milk & dairy items. 149
- Add lean protein to meals: lean beef, beans, chicken, turkey, seafood, tofu. 149
- Do not exceed more than 2,300 mg of sodium per day (about 1 teaspoon) 149
- Adults age 51+, African Americans of any age, & individuals with high blood pressure, diabetes, or chronic kidney disease: do not exceed 1,500 mg/day.
- Increase water intake & decrease soda and/or sugary drinks. 149
- Use smaller plates & eat slowly to feel satisfied without over-eating. 149
- Satisfy your sweet tooth in a healthy way (fruits, yogurt, sugar-free jello). 149

*Visit http://www.choosemyplate.gov/ to learn YOUR calorie level, use a personalized calorie & physical activity tracker

Exercise & Physical Fitness

Daily exercise is critical to support bodily functioning, strength, balance, flexibility, & emotional health. The minimum recommended guideline:

3, 10-minute exercise intervals per day (30 total minutes/day) 150
At least 5 days per week. 150

Use the link below to find more specific information for your age and types of physical activity & exercise that are appropriate for YOU!
http://www.choosemyplate.gov/physical-activity/amount.html

Blood Pressure (BP) Ranges

Did you know? Managing BP can help prevent heart attack, stroke, heart failure, & kidney disease. 16

Use this website from the American Heart Association to determine & learn about YOUR specific risk factors for the diseases mentioned above based on age, gender, & BP.

<table>
<thead>
<tr>
<th>Top number (mm Hg)</th>
<th>Bottom number (mm Hg)</th>
<th>Your category*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Below 120</td>
<td>and Below 80</td>
<td><strong>Normal BP</strong></td>
</tr>
<tr>
<td>120-139</td>
<td>or 80-89</td>
<td>Pre-Hypertension</td>
</tr>
<tr>
<td>140-159</td>
<td>or 90-99</td>
<td>Stage 1 Hypertension</td>
</tr>
<tr>
<td>160 or more</td>
<td>or 100 or more</td>
<td>Stage 2 Hypertension</td>
</tr>
</tbody>
</table>

Everyone, regardless of their BP reading, should adopt or maintain a healthy lifestyle. If your BP places you in either stage of hypertension, talk to a doctor about possible medications to help regulate your BP. 16

Body Mass Index (BMI) is a number determined from a person’s height & weight. It can serve as a screening tool for weight categories associated with health problems. 49 A high BMI puts you at a greater risk for developing: high BP, heart disease, type 2 diabetes, osteoarthritis, female infertility, high cholesterol & more. 51

Each individual’s BMI can be calculated using the following equation:

\[ BMI = \frac{(weight \ (lb))}{(height \ (in))^2 \times 703} \text{ or } \frac{(weight \ (kg))}{(height \ (m))^2} \]

<table>
<thead>
<tr>
<th>BMI</th>
<th>Weight category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 18.5</td>
<td>Underweight</td>
</tr>
<tr>
<td>18.6 - 25</td>
<td><strong>Healthy</strong></td>
</tr>
<tr>
<td>25.1 – 30</td>
<td>Overweight</td>
</tr>
<tr>
<td>30.1 and above</td>
<td>Obese</td>
</tr>
</tbody>
</table>

Dental Health

Proper brushing techniques are key to long term dental health and prevention.

- Every individual should visit the dentist 2x/year for checkups 14
- Brush teeth for 2 minutes at least 2x/day 14
- Floss daily 14
- Avoid sugary & starchy snacks 14
- Don’t smoke & don’t pierce any part of mouth 14
- Visit http://www.mouthhealthy.org/ to learn more
- ** Replace your toothbrush every 3-4 months! Germs that grow on your brush can cause cold & flu viruses and the viruses that cause cold sores. 14
Workshop 5

Making Healthy Eating Part of Your Total Lifestyle

Eat Healthy ● Be Active
Community Workshops
Instructor Guide

Before Workshop Begins

- Thoroughly read entire workshop and become familiar with the lesson plan.
- Gather materials needed for the icebreaker and activity.
  - **Icebreaker**: A variety of whole grain foods, such as whole wheat pasta (cooked prior to class), brown rice (cooked prior to class), whole wheat bread (cut into portions to try), whole grain crackers, whole grain cereal, etc., serving plates and utensils for participants to try foods offered.
  - **Activity**: No supplies necessary
- Photocopy handouts (one per participant):
  1. Making Healthy Eating Part of Your Total Lifestyle (2 pages)
  2. GO, SLOW, and WHOA Foods (2 pages)
  3. Tips for Using the Nutrition Facts Label (1 page)
  4. MyPlate/10 Tips to Enjoy Your Food, But Eat Less (2 pages)
  5. Workshop Evaluation (1 page)

Workshop Outline

The workshop should last ~1 hour, including activities.

- Icebreaker activity (5 minutes)—do this while people are coming into the workshop
- Introduction (5 minutes)
  - Explain the purpose of the workshop
  - Review the Learning Objectives
- **Objective 1**: Learn the concepts of a healthy lifestyle (10 minutes)
  - Review handout: *Making Healthy Eating Part of Your Total Lifestyle*
- Stretch Break (5 minutes)
- **Objective 2**: Learn about foods that should be eaten regularly and those that should be eaten only occasionally (5 minutes)
  - Review handout: *GO, SLOW, and WHOA Foods*
• **Objective 3:** Learn how to read and understand the Nutrition Facts Label (5 minutes)

• Activity (5–10 minutes)
  – Review handout: *Tips for Using the Nutrition Facts Label*

• Increasing Physical Activity (1–2 minutes)

• Review handout *MyPlate* and how to use *10 Tips to Enjoy Your Food, But Eat Less* (2 minutes)

• Wrap-up/Q&A (5 minutes)
  – Reminders of things to try at home:
    ■ Read the Nutrition Facts Labels to compare food at the grocery store
    ■ Continue to build up the amount of physical activity you do each day

• Ask participants to complete the evaluation form (5 minutes)
Workshop Lesson Plan

Icebreaker Activity—Taste Testing (5 minutes)

**Whole Grain Tasting:** Gather a variety of different whole grain foods (try items such as pasta, rice, cereal, crackers, bread, etc.) and have participants taste a few as they come into the workshop.

**Supplies necessary:** A variety of whole grain foods, such as whole wheat pasta (cooked prior to class), brown rice (cooked prior to class), whole wheat bread (cut into portions to try), whole grain crackers, whole grain cereal, etc., serving plates and utensils for participants to try foods selected.

Talking Points—Purpose of the Workshop (2–3 minutes)

- Today’s workshop and handouts will give you tips for incorporating a healthy diet and regular physical activity into your lifestyle.

- This workshop is based on the *Dietary Guidelines for Americans, 2010* and the *2008 Physical Activity Guidelines for Americans*. The Dietary Guidelines provide science-based advice for making food choices that promote good health and a healthy weight and help prevent disease. The Physical Activity Guidelines provide recommendations on the amount, types, and level of intensity of physical activity needed to achieve and maintain good health.

- The Dietary Guidelines provide these selected consumer messages. More information about the messages can be found at [http://www.ChooseMyPlate.gov](http://www.ChooseMyPlate.gov).
  - **Balancing Calories**
    - Enjoy your food, but eat less.
    - Avoid oversized portions.
  - **Foods to Increase**
    - Make half your plate fruits and vegetables.
    - Make at least half your grains whole grains.
    - Switch to fat-free or low-fat (1%) milk.
  - **Foods to Decrease**
    - Compare sodium in foods like soup, bread, and frozen meals—and choose foods with lower numbers.
    - Drink water instead of sugary drinks.
Healthy eating and physical activity work hand in hand to help us live healthier lives. The Physical Activity Guidelines recommend that adults be physically active for at least 2 hours and 30 minutes each week—children need 60 minutes each day.

✓ You can stay physically active by doing activities such as walking, dancing, bicycling, or gardening and by reducing the amount of time you spend sitting.

Talking Points—Learning Objectives (2–3 minutes)

1. Learn the concepts of a healthy lifestyle.
2. Learn about foods that should be eaten regularly and those that should be eaten only occasionally.
3. Learn how to read and understand the Nutrition Facts Label.

Talking Points—Handout: Making Healthy Eating Part of Your Total Lifestyle (10 minutes)

Note: These talking points cover all of the key consumer behaviors and potential strategies for professionals in the Dietary Guidelines. Depending on time/participant questions, you may choose to cover just a few bullets under each heading.

Add More Fruits and Vegetables

Vegetables

- Make half your plate vegetables and fruits, especially nutrient-packed ones that are red, orange, and green.
- Include vegetables in meals and in snacks. Fresh, frozen, and canned vegetables all count. When eating canned vegetables, choose those labeled as reduced sodium or no-salt-added.
- Add dark green, red, and orange vegetables to soups, stews, casseroles, stir-fries, and other main and side dishes. Use dark leafy greens, such as romaine lettuce and spinach, to make salads.
- Focus on dietary fiber—beans and peas are a great source. Add beans or peas to salads (e.g., kidney or garbanzo beans), soups (e.g., split peas or lentils), and side dishes (e.g., baked beans or pinto beans), or serve as a main dish.
• Keep raw, cut-up vegetables handy for quick snacks. If serving with a dip, choose lower calorie options, such as yogurt-based dressings or hummus, instead of sour cream or cream cheese-based dips.

• When eating out, choose a vegetable as a side dish. With cooked vegetables, request that they be prepared with little or no fat and salt. With salads, ask for the dressing on the side so you can decide how much you use.

• When adding sauces, condiments, or dressings to vegetables, use small amounts and look for lower calorie options (e.g., reduced-fat cheese sauce or fat-free dressing). Sauces can make vegetables more appealing, but often add extra calories.

Fruits

• Use fruit as snacks, salads, or desserts.

• Instead of sugars, syrups, or other sweet toppings, use fruit to top foods such as cereal and pancakes.

• Enjoy a wide variety of fruits, and maximize taste and freshness by adapting your choices to what is in season.

• Keep rinsed and cut-up fruit handy for quick snacks.

• Use canned, frozen, and dried fruits, as well as fresh fruits. Unsweetened fruit or fruit canned in 100% juice is the better choice because light or heavy syrup adds sugar and calories.

• Select 100% fruit juice when choosing juices.

Bring on the Whole Grains

• Substitute whole-grain choices for refined grains in breakfast cereals, breads, crackers, rice, and pasta.

• For example, choose 100% whole-grain breads; whole-grain cereals such as oatmeal; whole-grain crackers and pasta; and brown rice. Check the ingredients list on product labels for the words “whole” or “whole-grain” before the grain ingredient’s name.

• Note that foods labeled with the words “multi-grain,” “stone-ground,” “100% wheat,” “cracked wheat,” “seven-grain,” or “bran” are usually not 100% whole-grain products, and may not contain any whole grains.

• Use the Nutrition Facts Label and the ingredients list to choose whole grains that are a good or excellent source of dietary fiber.
• Good sources of fiber contain 10–19% of the Daily Value per serving, and excellent sources of dietary fiber contain 20% or more.

**Cut Back on Sodium and Salt**

• Use the Nutrition Facts Label to choose foods lower in sodium.

• When purchasing canned foods, select those labeled as “reduced sodium,” “low sodium” or “no salt added.” Rinse regular canned foods to remove some sodium. Many packaged foods contain more sodium than their made-from-fresh counterparts.

• Use little or no salt when cooking or eating. Trade in your salt shaker for a pepper shaker. Spices, herbs, and lemon juice can be used as alternatives to salt to season foods with a variety of flavors.

• Gradually reduce the amount of sodium in your foods. Your taste for salt will change over time.

• Get more potassium in your diet. Food sources of potassium include potatoes, cantaloupe, bananas, beans, and yogurt.

**Putting It All Together**

• Start by making small changes and eating a variety of foods that your body needs for good health.

**Stretch Break (5 minutes)**

"Fruit Basket"—a nutrition-themed version of musical chairs

This is a simple game that’s best for a group of at least eight players. Set up a circle with enough chairs for all of your players minus one. Next, you’ll need to assign each player a fruit, labeling players as strawberry, orange, banana, etc. Two players should be assigned to each fruit. One person should remain standing, and everyone else should sit in the chairs. The standing person will call out a fruit name, and any player sitting in the circle assigned to that fruit then has to jump up and try to find a new seat. The caller also should try as fast as possible to sit in one of the open seats. In the end, a player will be left without a seat. That player (left standing) will then call out another fruit, and the game continues. For fun, try calling out more than one fruit at a time. The caller also has the option of calling out “fruit basket!” When that happens, all players get up from their chairs and find a new one. It gets a little crazy as everyone tries to get a seat. If needed, you can set a rule that a player getting up from a chair must find a new one at least two seats away (to encourage players to get up and run around).
Talking Points—Handout: GO, SLOW, and WHOA Foods (5 minutes)

- **GO** foods contain a low amount of fat and added sugar. They are rich in nutrients and relatively low in calories. Examples of **GO** foods include fruits and vegetables, whole-grain foods without added fats, fat-free or low-fat (1%) milk and milk products, and lean cuts of meat. Enjoy **GO** foods almost any time.

- **SLOW** foods are higher in fat and added sugar than **GO** foods. Examples of **SLOW** foods include vegetables prepared with added fat (such as butter) and sauces, French toast, fruit canned in syrup, and 2% low-fat milk. Have **SLOW** foods sometimes or less often.

- **WHOA** foods are the highest in fat and added sugar of the three groups. **WHOA** foods have the most calories, and many are low in nutrients. Examples of **WHOA** foods include fried foods; baked goods such as croissants, doughnuts, cakes, and pies; whole milk; candy; regular soda; and chips. Have **WHOA** foods only once in a while or on special occasions.

Activity—Using a Nutrition Facts Label (5–10 minutes)

**Nutrition Facts Label:** Pass out handout Tips for Reading the Nutrition Facts Label and review the talking points listed below. Depending on the size of the group, you may want to pass out a label for each group of 2–3 people to work together to identify components of the food label, such as portion size, sodium, etc.

**Supplies necessary:** A variety of nutrition facts labels from food containers.

Talking Points—Handout: Tips for Using the Nutrition Facts Label (5 minutes)

- Look at the serving size and determine how many servings you are actually eating.
  - If you eat two servings of a food, you will consume double the calories.

- Choose foods with less sugar.
  - Foods with added sugars (names include sucrose, glucose, high fructose corn syrup, corn syrup, maple syrup, and fructose) provide calories with few nutrients. Make sure that added sugars are not one of the first few ingredients.
• Look for foods low in solid fats (saturated and trans fat) and cholesterol to help reduce the risk of heart disease. Choose healthier fats, such as polyunsaturated and monounsaturated fats, found in fish, nuts, and vegetable oils.

• Compare sodium in products. Most sodium comes from processed foods.
  – A diet rich in potassium can help reverse some of the effects of sodium on blood pressure.

### Talking Points—Increasing Physical Activity (1–2 minutes)

The *Physical Activity Guidelines for Americans* recommend that everyone engage in regular physical activity for health benefits.

Here are the recommendations for adults:

<table>
<thead>
<tr>
<th>Types of Activity</th>
<th>Moderate Activity</th>
<th>Vigorous Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td>Walking briskly, biking on flat ground, line dancing, gardening</td>
<td>Jumping rope, basketball, soccer, swimming laps, aerobic dance</td>
</tr>
<tr>
<td></td>
<td>If you choose activities at a moderate level, do at least 2 hours and 30 minutes a week</td>
<td>If you choose activities at a vigorous level, do at least 1 hour and 15 minutes a week</td>
</tr>
</tbody>
</table>

• You can combine moderate and vigorous activities. In general, 1 minute of vigorous activity is equal to 2 minutes of moderate activity.

• Children need **60 minutes of physical activity each day**.

**TODAY’S TIP:** Slowly build up the amount of physical activity you choose.

✓ Start with 10 minutes of activity, and then add time so you are being active for longer each time.

✓ As you feel more comfortable, do more by being active more often and increasing the pace of your activity.

• Consider signing up for the Presidential Active Lifestyle Award (PALA+) to help you track your physical activity and take small steps to improve your eating habits.

• If you are active for 30 minutes a day, 5 days a week for 6 out of 8 weeks, and choose one nutrition goal each week to work toward, you’ll be awarded the PALA+ and receive Presidential recognition! (See [http://www.presidentschallenge.org](http://www.presidentschallenge.org)) See handout in Appendix for more information.
Talking Points—Handouts: MyPlate and 10 Tips (2 minutes)

Things to Try at Home
- Read the Nutrition Facts Labels to compare food at the grocery store.
- Slowly build up the amount of physical activity you do each day.

Talking Points—Wrap-up/Q&A (5 minutes)

Complete Evaluation Form (5 minutes)
Workshop 5  •  Handouts
Eat Healthy Your Way

Making healthy eating part of your total lifestyle

See how it worked for Dwayne Davis

“"My doctor said I needed to eat better to help me stay healthier longer. But I wasn’t sure where to start after years of eating whatever I wanted. Then she suggested I try something called ‘total diet.’ It really isn’t a diet at all—but a way of life. The bottom line about total diet is to eat healthy most of the time.

"I stopped thinking of foods as either ‘all good’ or ‘all bad.’ First I started eating more healthy foods that were loaded with vitamins, minerals, and fiber. And I ate junk food less often and in smaller amounts.”

I challenged myself!

“"I’ve done lots of tough things before. So I challenged myself to see whether I could stick to eating healthy for a month. If I could do that, then I knew I was on my way to following a good eating plan for life.”

Dwayne’s Week 1: Add more fruits and vegetables

“Adding vegetables was easier than I thought. I found I like broccoli, spinach, and cauliflower. Half of a sweet potato cooked in the microwave makes a sweet and healthy snack. I replaced my usual cookies at lunch with a piece of fresh fruit. The fruit costs less than a candy bar and is loaded with fiber and vitamins.”

Ready to try more vegetables?
Go for the red and orange (sweet potatoes, carrots) and green (broccoli, spinach) kinds to get the most nutrients.

Dwayne’s Week 2: Bring on the whole grains!

“Eating 100% whole-wheat bread took some getting used to. But now I really like the taste. And it has fiber that fills me up for longer than white bread. I even prefer other whole grains like brown rice over white rice.”

Want to eat whole grains too?
Good choices include 100% whole-wheat pasta, breads, and tortillas. Try rolled oats and brown rice too. Read labels. Look for the words “100% whole wheat” or “whole grain” on the package.

For more information, visit www.healthfinder.gov
Small changes can make a large difference

Dwayne’s Week 3: Cut back on salt (sodium) and sugar

“Once I started reading labels, I was surprised at how much sodium is in packaged foods. High blood pressure runs in my family and cutting back on salt makes a lot of sense health-wise. And sugar? I stopped drinking my daily super-sized 64-ounce soft drink. Turned out the drink had 800 calories—about half of what many people need for the whole day!”

Limit how often and how much salt you eat.
Eat less of these salty foods: pickles, soy sauce, hot dogs, lunch meats, chips, and pretzels. Look for the words “low sodium” or “no salt added” on canned vegetables, vegetable juices, and soups.

Eat fewer sweets.
Cut back on empty calories that offer you no nutrients. Eat fruit instead of desserts. Drink fat-free milk, water, or a small glass of 100% juice instead of sugary soft drinks.

From Week 4 on: Put it all together for a successful healthy eating plan

“By making small changes over time I was beginning to follow a healthy food plan I knew I could stick to. And you know what? I felt better and I also lost weight.”

Food experts suggest eating a variety of foods that give you what your body needs for good health. No food is forbidden—the key is to eat far more of the foods that are good for you and less of the foods that aren’t.

The bottom line?
Watch how much you eat of each food. For more about portion and serving sizes, visit www.win.niddk.nih.gov/publications/just_enough.htm.

Include these foods in your food plan:
- Fruits and vegetables.
- Whole grains, such as brown rice, oats, whole-wheat pasta, and whole-grain breads.
- Foods with a lot of calcium, such as fat-free milk and milk products like low-fat yogurt and reduced-fat cheese. Spinach, collard greens, and kale are a source of calcium.
- Lean meats, light meat chicken and turkey, fish, eggs, and beans.
- Healthy fats, such as olive oil, canola oil, and nuts. Just watch your portions.

Now that you’ve read Dwayne’s story . . .
What tips will you try as you follow a healthy total diet?
GO, SLOW, and WHOA Foods
Use this chart as a guide to help you and your family make smart food choices. Post it on your refrigerator at home, or take it with you to the store when you shop.

**GO foods**—Eat almost anytime.

**SLOW foods**—Eat sometimes or less often.

**WHOA foods**—Eat only once in a while or for special occasions.

<table>
<thead>
<tr>
<th>Food Group</th>
<th>GO Almost anytime foods (Nutrient-dense foods)</th>
<th>SLOW Sometimes foods (Moderate nutrients/calories)</th>
<th>WHOA Once in a while foods (Calorie dense foods)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vegetables</td>
<td>Almost all fresh, frozen, and canned vegetables without added fat and sauces</td>
<td>All vegetables with added fat and sauces; oven-baked French fries; avocado</td>
<td>Fried potatoes, like French fries or hash browns; other deep-fried vegetables</td>
</tr>
<tr>
<td>Fruits</td>
<td>All fresh, frozen, canned in juice</td>
<td>100% fruit juice; fruits canned in light syrup; dried fruits</td>
<td>Fruits canned in heavy syrup</td>
</tr>
<tr>
<td>Breads and Cereals</td>
<td>Whole-grain breads, including pita bread; tortillas and whole-grain pasta; brown rice; hot and cold unsweetened whole-grain breakfast cereals</td>
<td>White refined flour bread, rice, and pasta; French toast; taco shells; cornbread; biscuits; granola; waffles and pancakes</td>
<td>Croissants; muffins; doughnuts; sweet rolls; crackers made with trans fats; calorically sweetened breakfast cereals</td>
</tr>
<tr>
<td>Milk and Milk Products</td>
<td>Fat-free or 1% low-fat milk; fat-free or low-fat yogurt; part skim, reduced-fat, and fat-free cheese; low-fat or fat-free cottage cheese</td>
<td>2% low-fat milk; processed cheese spread</td>
<td>Whole milk; full-fat American, cheddar, Colby, Swiss, or cream cheese; whole-milk yogurt</td>
</tr>
<tr>
<td>Meats, Poultry, Fish, Eggs, Beans, and Nuts</td>
<td>Trimmed beef and pork; extralean ground beef; chicken and turkey without skin; tuna canned in water; baked, broiled, steamed, or grilled fish and shellfish; beans, split peas, lentils, tofu; egg whites and egg substitutes</td>
<td>Lean ground beef; broiled hamburgers; ham, Canadian bacon; chicken and turkey with skin; low-fat hot dogs; tuna canned in oil; peanut butter; nuts; whole eggs cooked without added fat</td>
<td>Untrimmed beef and pork; regular ground beef; fried hamburgers; ribs; bacon; fried chicken, chicken nuggets; hot dogs, lunch meats, pepperoni, sausage; fried fish and shellfish; whole eggs cooked with fat</td>
</tr>
<tr>
<td>Sweets and Snacks*</td>
<td>Ice milk bars; frozen fruit juice bars; low-fat or fat-free frozen yogurt and ice-cream; fig bars, ginger snaps, baked chips; low-fat microwave popcorn; pretzels</td>
<td>Cookies and cakes; pies; cheesecake; ice cream; chocolate; candy; chips; buttered microwave popcorn</td>
<td></td>
</tr>
</tbody>
</table>

* Though some of the foods in this row are lower in fat and calories, all sweets and snacks need to be limited, in order to stay within one’s daily calorie needs.
How you choose to prepare or order your food when eating out can quickly turn a less healthy food into a healthier option. Choosing baked, broiled, steamed, grilled, and microwaved foods saves you from extra fat and calories. See the examples below on how similar foods can go from a GO to a SLOW or a WHOA food.

**Vegetable and olive oils contain no saturated or trans fats and can be consumed daily, but in limited portions to meet daily calorie needs.**


Tips for Using the Nutrition Facts Label

Here are some tips for reading the label and making smart food choices:

**Check servings and calories.** Compare this to how many servings you are actually eating.

**Eat less sugar.** Look for foods and beverages low in added sugars. Names for added sugars include sucrose, glucose, high fructose corn syrup, corn syrup, maple syrup, and fructose.

**Know your fats.** Look for foods low in saturated and trans fats, and cholesterol, to help reduce the risk of heart disease. Most of the fats you eat should be polyunsaturated and monounsaturated fats, such as those in fish, nuts, and vegetable oils.

**Reduce sodium (salt) and increase potassium.** Research shows that eating less than 2,300 milligrams of sodium (about 1 teaspoon of salt) per day may reduce the risk of high blood pressure. If you are age 51 or older, African American, or have hypertension, diabetes, or chronic kidney disease, aim to eat 1,500 milligrams of sodium each day—about ¾ teaspoon.

To meet the daily potassium recommendation of at least 4,700 milligrams, consume fruits and vegetables, and fat-free and low-fat milk products, that are sources of potassium, including sweet potatoes, white potatoes, white beans, plain yogurt, prune juice, and bananas. These can help reduce some of sodium’s effects on blood pressure.

**Sources:** Dietary Guidelines for Americans, *A Healthier You*, Part III.

enjoy your food, but eat less

10 tips to enjoying your meal

You can enjoy your meals while making small adjustments to the amounts of food on your plate. Healthy meals start with more vegetables and fruits and smaller portions of protein and grains. And don’t forget dairy—include fat-free or low-fat dairy products on your plate, or drink milk with your meal.

1. get to know the foods you eat
   Use the SuperTracker to find out what kinds of foods and how much to eat and to get tips and support for making better food choices.

2. take your time
   Be mindful to eat slowly, enjoy the taste and textures, and pay attention to how you feel. Use hunger and fullness cues to recognize when to eat and when you’ve had enough.

3. use a smaller plate
   Use a smaller plate at meals to help with portion control. That way you can finish your entire plate and feel satisfied without overeating.

4. if you eat out, choose healthier options
   Check and compare nutrition information about the foods you are eating. Preparing food at home makes it easier to control what is in your meals.

5. satisfy your sweet tooth in a healthy way
   Indulge in a naturally sweet dessert dish—fruit! Serve a fresh fruit cocktail or a fruit parfait made with yogurt. For a hot dessert, bake apples and top with cinnamon.

6. choose to eat some foods more or less often
   Choose more vegetables, fruits, whole grains, and fat-free or 1% milk and dairy products. Cut back on foods high in solid fats, added sugars, and salt.

7. find out what you need
   Get your personalized plan by using the SuperTracker to identify your food group targets. Compare the foods you eat to the foods you need to eat.

8. sip smarter
   Drink water or other calorie-free beverages, 100% juice, or fat-free milk when you are thirsty. Soda and other sweet drinks contain a lot of sugar and are high in calories.

9. compare foods
   Check out the Food-A-Pedia to look up and compare nutrition information for more than 8,000 foods.

10. make treats “treats,” not everyday foods
    Treats are great once in a while. Just don’t make treat foods an everyday choice. Limit sweet treats to special occasions.

Go to www.ChooseMyPlate.gov for more information.
# Making Healthy Eating Part of Your Total Lifestyle Evaluation

<table>
<thead>
<tr>
<th>1=Strongly Disagree</th>
<th>2=Disagree</th>
<th>3=Neither Disagree or Agree</th>
<th>4=Agree</th>
<th>5=Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The workshop covered useful information.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. The workshop activities were helpful.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I will look at the Nutrition Facts Label when food shopping this week.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. I plan to change my eating habits based on the information I learned today.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. I plan to become more active based on the information learned today.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. The instructor presented the information in a helpful way.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Overall, I found the workshop to be very helpful.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Please tell us which materials you found most useful.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Workshop 6

Physical Activity Is Key to Living Well

Eat Healthy  ●  Be Active
Community Workshops
Instructor Guide

Before Workshop Begins

- Thoroughly read entire workshop and become familiar with the lesson plan.
- Choose an activity to do, and gather materials needed for the icebreaker and the chosen activity.
  - Icebreaker: Find Someone Who . . . handout for each participant, healthy prize items
  - Activity 1: Two soup cans or resistance bands of modest tension for each participant
  - Activity 2 (Group Walk): Comfortable shoes to walk in
- Note: It would be a good idea to let participants know you will be doing some light exercising during this workshop and they may want to wear comfortable clothing and shoes.
- Photocopy handouts (one per participant):
  1. Be Active Your Way: A Fact Sheet for Adults (2 pages)
  2. Find Someone Who . . . (1 page)
  3. Muscle-Strengthening Exercises (6 pages)
  4. My Aerobic and Strengthening Activities Log (1 page)
  5. How Many Calories Does Physical Activity Use? (1 page)
  6. Workshop Evaluation (1 page)

Workshop Outline

*The workshop should last ~1 hour, including activities.*

- Icebreaker activity (5 minutes)—do this while people are coming into the workshop
- Introduction (5 minutes)
  - Explain the purpose of the workshop
  - Review the Learning Objectives
• **Objective 1:** Learn the benefits of physical activity and the specific recommendations for aerobic and strengthening activities (5–10 minutes)
  – Review handout: *Be Active Your Way: A Fact Sheet for Adults*

• **Objective 2:** Learn how to do strength-training activities (5 minutes)
  – Activity (10–15 minutes) Note: Choose ahead of time and gather supplies as needed
  – Review handout: *Muscle-Strengthening Exercises* (do activity with this)

• **Objective 3:** Learn how to develop and maintain a successful plan for physical activity. (5–10 minutes)
  – Review handout: *My Aerobic and Strengthening Activities Log*

• Wrap-up/Q&A (5 minutes)
  – Reminders of things to try at home:
    - Work on increasing the amount of time you do physical activity each day
    - Make a plan for physical activity (aerobic and strength training) and keep track of your progress

• Ask participants to complete the evaluation form (5 minutes)
Workshop Lesson Plan

Icebreaker Activity (5 minutes)

“Find Someone Who”: This bingo-like game shows participants the many ways to stay active while letting them get to know one another. Pass out the game sheet and ask participants to walk around the room and talk to one another to learn which physical activities each likes to do. Participants then sign their names in the boxes for the activities they do. Depending on the size of the group, set a limit on how many boxes the same person can sign on a participant’s game sheet (usually just two). Award a healthy prize (fruit, water bottle, jump rope, etc.) to the first person to get a complete row signed. To keep the game going, ask participants to try and complete two rows, a “T” pattern, or even the whole grid. It’s helpful to have several prizes on hand to reward winners.

Supplies necessary: Find Someone Who . . . handout for each participant, healthy prize items.

Talking Points—Purpose of the Workshop (2–3 minutes)

- Today’s workshop and handouts will give you tips on the amount of physical activity you need each day and ways to include physical activity as part of your daily routine.
- This workshop is based on the Dietary Guidelines for Americans, 2010 and the 2008 Physical Activity Guidelines for Americans. The Dietary Guidelines provide science-based advice for making food choices that promote good health and a healthy weight and help prevent disease. The Physical Activity Guidelines provide recommendations on the amount, types, and level of intensity of physical activity needed to achieve and maintain good health.
- The Dietary Guidelines provide these selected consumer messages. More information about the messages can be found at http://www.ChooseMyPlate.gov.
  - Balancing Calories
    - Enjoy your food, but eat less.
    - Avoid oversized portions.
  - Foods to Increase
    - Make half your plate fruits and vegetables.
    - Make at least half your grains whole grains.
Switch to fat-free or low-fat (1%) milk.

- **Foods to Decrease**
  - Increase your chances for living longer.
  - Decrease risk of heart disease, type-2 diabetes, high blood pressure, high cholesterol, stroke, and some types of cancer (breast and colon).
  - Sleep better.
  - Fight depression.
  - Build strength.
  - Maintain a healthy weight.
  - Have fun!

Healthy eating and physical activity work hand in hand to help us live healthier lives. The Physical Activity Guidelines recommend that adults be physically active for at least 2 hours and 30 minutes each week—children need 60 minutes each day.

You can stay physically active by doing activities such as walking, dancing, bicycling, or gardening and by reducing the amount of time you spend sitting.

### Talking Points—Learning Objectives (2–3 minutes)

1. Learn the benefits of physical activity and the specific recommendations for aerobic and strengthening activities.
2. Learn how to do strength-training activities.
3. Learn how to develop and maintain a successful plan for physical activity.

### Talking Points—Handout: Be Active Your Way Fact Sheet (5–10 minutes)

### Getting Started

- Learn the benefits of physical activity.
  - Increase your chances for living longer.
  - Decrease risk of heart disease, type-2 diabetes, high blood pressure, high cholesterol, stroke, and some types of cancer (breast and colon).
  - Sleep better.
  - Fight depression.
  - Build strength.
  - Maintain a healthy weight.
  - Have fun!
**How Much Physical Activity Do I Need?**

**Aerobic Activity**

- Adults should get at least **2 hours and 30 minutes** each week of aerobic physical activity that requires **moderate** effort or **1 hour and 15 minutes** each week of aerobic physical activity that requires **vigorous** effort.
  - Adults need to do aerobic activity for at least 10 minutes at a time for health benefits.
  - Adults can do a combination of moderate and vigorous activities each week. In general, 1 minute of vigorous activity is equal to 2 minutes of moderate activity.
- Examples of **moderate aerobic activity** include walking briskly, biking slowly, canoeing, ballroom and line dancing, general gardening, doubles tennis, using a manual wheelchair, etc.
- Examples of **vigorous aerobic activity** include race walking, jogging, or running, biking fast, aerobic or fast dancing, heavy gardening (digging, hoeing), singles tennis, etc.

**Muscle Strengthening Activity**

- Adults also should do strengthening activities at least **2 days a week**.
- Examples of strengthening activities include pushups, situps, lifting weights, working with resistance bands, and heavy gardening.
  - Choose activities that work all the different parts of the body (legs, hips, back, chest, stomach, shoulders, and arms).
  - Exercises for each muscle group should be repeated 8 to 12 times per session.

**Activity—Choose One Ahead of Time (10–15 minutes)**

1. **Strengthening Exercises**: Using resistance bands (if you have them or can get them) or soup cans, demonstrate sample strengthening exercises from the National Institute on Aging. Select the exercises that work best given your physical space and type of chairs. Before working with participants, make sure that you have reviewed the exercises and tips. The arm raises, arm curls, and leg raises may be good ones for participants to try during the workshop.

   **Supplies necessary**: Two soup cans or resistance bands of modest tension for each participant
2. **Group Walk:** If you are unable to do a strengthening workout during the workshop, take participants on a 10–15 minute walk instead. Plan your route ahead of time and make sure it is safe and free of potholes and other things that could cause missteps or accidents.

**Supplies necessary:** Comfortable shoes to walk in

**Note:** It would be a good idea to let participants know you will be doing some light exercising during this workshop and they may want to wear comfortable clothing and shoes.

**Talking Points—Handout: Muscle-Strengthening Exercises (5 minutes)**

- Demonstrate that a repetition, or rep, is one complete movement of an exercise, and that a set is one group of reps—about 8–12 repetitions. Start out using light weights, such as 1- or 2-pound weights (a soup can usually weighs either 1 or 2 pounds). For those new to strength training, it’s perfectly okay to start with no weights at all. Starting out with weights that are too heavy can cause injuries.

- Don’t jerk or thrust weights into position. Use smooth, steady movements.

- Avoid locking your arm and leg joints in a tightly straightened position.

- Don’t hold your breath. Breathe regularly.

- Muscle soreness lasting a few days and slight fatigue are normal after muscle-building exercises, at least at first.

- If you feel sick or have pain during or after exercise, you’re doing too much.

- Over time, gradually increase the amount of weight used to build strength.

Talking Points—Handout: My Aerobic and Strengthening Activities Log (5–10 minutes)

**Getting Started**

- Think about reasons why you have not been physically active. **Note:** You may want to have the participants share some of their reasons.

- Pick a physical activity that you like and one that fits into your life.

- Find the time that works best for you. Before work? After the kids go to bed? You decide!

- Be active with friends and family who can help you keep up with your physical activity plan.

- Consider using a pedometer to track your walking. Set goals to increase your number of steps every day or each week.

- There are health benefits of doing at least 10 minutes of physical activity at a time.

- Avoid sitting still—take advantage of all opportunities during the day to move!
  - Take the stairs instead of the elevator.
  - Park farther away in the parking lot.
  - Walk over to a coworker's desk instead of sending an e-mail.

**Making Exercise Work for You**

- Plan your activity for the week ahead of time.
  - Aim for at least 2 hours and 30 minutes of moderate physical activity each week.
    - It’s best to spread aerobic activity out over at least 3 days a week.
    - Include strengthening activities 2 days a week to keep your muscles strong.

- Track your time and progress.

- Looking to add to your physical activity?
  - Work toward doubling your weekly activity time to 5 hours per week.
  - Replace some of your moderate-level aerobic activities with vigorous aerobic activities that make your heart beat even faster. In general, 15 minutes of vigorous activity provides the same benefits as 30 minutes of moderate activity.
Vigorous activities include playing basketball, jogging/running, riding a bike faster or up hills, swimming laps, jumping rope, aerobic dance, etc.

Add an extra day to your 2 days of strengthening activities.

Mix it up: You can do all moderate activities, all vigorous activities, or some of each. Don’t forget activities for stronger muscles.

Avoid injury. You can do this by:
- Start slowly and build up to more activity.
- Choose activities that are appropriate for your level of fitness.
- Use the right safety gear and sports equipment.
- Choose a safe place to do your activity.

Sign Up: Keep track of your physical activity (and nutrition goals!) by signing up for the Presidential Active Lifestyle Award (PALA+). You also can take small steps to improve your eating habits.

If you are active for 30 minutes a day, 5 days a week for 6 out of 8 weeks, and choose one nutrition goal each week to work toward, you’ll be awarded the PALA+ and receive Presidential recognition! (See http://www.presidentschallenge.org) See handout in Appendix for more information.

Talking Points—Wrap-up/Q&A (5 minutes)

Things to Try at Home

- Work on increasing the amount of time you do physical activity each day
- Make a plan for physical activity (aerobic and strength training) and keep track of your progress.

Complete Evaluation Form (5 minutes)
Finding out what kind and how much physical activity you need

How do I do it?
It’s your choice. Pick an activity that’s easy to fit into your life. Do at least 10 minutes of physical activity at a time. Choose aerobic activities that work for you. These make your heart beat faster and can make your heart, lungs, and blood vessels stronger and more fit. Also, do strengthening activities which make your muscles do more work than usual.

Why should I be physically active?
Physical activity can make you feel stronger and more alive. It is a fun way to be with your family or friends. It also helps you improve your health.

How many times a week should I be physically active?
It is up to you, but it is better to spread your activity throughout the week and to be active at least 3 days a week.

How do I build up more physical activity?
Do a little more each time. Once you feel comfortable, do it more often. Then you can trade activities at a moderate level for vigorous ones that take more effort. You can do moderate and vigorous activities in the same week.

<table>
<thead>
<tr>
<th>How much physical activity do I need to do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>This chart tells you about the activities that are important for you to do. Do both aerobic activities and strengthening activities. Each offers important health benefits. And remember, some physical activity is better than none!</td>
</tr>
</tbody>
</table>

### Aerobic Activities

<table>
<thead>
<tr>
<th>If you choose activities at a moderate level, do at least <strong>2 hours and 30 minutes</strong> a week.</th>
<th>If you choose vigorous activities, do at least <strong>1 hour and 15 minutes</strong> a week.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Slowly build up the amount of time you do physical activities. The more time you spend, the more health benefits you gain. Aim for twice the amount of activity in the box above.</td>
<td></td>
</tr>
</tbody>
</table>
• Do at least 10 minutes at a time.  
• You can combine moderate and vigorous activities. |

### Muscle Strengthening Activities

<table>
<thead>
<tr>
<th>Do these at least <strong>2 days</strong> a week.</th>
</tr>
</thead>
</table>
| • Include all the major muscle groups such as legs, hips, back, chest, stomach, shoulders, and arms.  
• Exercises for each muscle group should be repeated 8 to 12 times per session. |

Be Active, Healthy, and Happy!
How can I tell an activity at a moderate level from a vigorous one? Vigorous activities take more effort than moderate ones. Here are just a few moderate and vigorous aerobic physical activities. Do these for **10 minutes or more** at a time.

<table>
<thead>
<tr>
<th><strong>Moderate Activities</strong></th>
<th><strong>Vigorous Activities</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>(I can talk while I do them, but I can't sing.)</td>
<td>(I can only say a few words without stopping to catch my breath.)</td>
</tr>
<tr>
<td>• Ballroom and line dancing</td>
<td>• Aerobic dance</td>
</tr>
<tr>
<td>• Biking on level ground or with few hills</td>
<td>• Biking faster than 10 miles per hour</td>
</tr>
<tr>
<td>• Canoeing</td>
<td>• Fast dancing</td>
</tr>
<tr>
<td>• General gardening (raking, trimming shrubs)</td>
<td>• Heavy gardening (digging, hoeing)</td>
</tr>
<tr>
<td>• Sports where you catch and throw (baseball, softball, volleyball)</td>
<td>• Hiking uphill</td>
</tr>
<tr>
<td>• Tennis (doubles)</td>
<td>• Jumping rope</td>
</tr>
<tr>
<td>• Using your manual wheelchair</td>
<td>• Martial arts (such as karate)</td>
</tr>
<tr>
<td>• Using hand cyclers—also called ergometers</td>
<td>• Race walking, jogging, or running</td>
</tr>
<tr>
<td>• Walking briskly</td>
<td>• Sports with a lot of running (basketball, hockey, soccer)</td>
</tr>
<tr>
<td>• Water aerobics</td>
<td>• Swimming fast or swimming laps</td>
</tr>
<tr>
<td></td>
<td>• Tennis (singles)</td>
</tr>
</tbody>
</table>

For more information, visit [www.healthfinder.gov/getactive](http://www.healthfinder.gov/getactive)

**Be active your way** by choosing activities you enjoy!
### Find Someone Who . . .

#### How Do You Stay Active?

<table>
<thead>
<tr>
<th>Went for a bike ride this week</th>
<th>Likes to swim</th>
<th>Has run in a race before</th>
<th>Goes for a brisk walk on most days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likes to play tennis</td>
<td>Has jumped rope as an adult</td>
<td>Plays on a sports team</td>
<td>Engaged in aerobic exercise three times last week</td>
</tr>
<tr>
<td>Feels good after exercising</td>
<td>Has used a pedometer before</td>
<td>Enjoys canoeing or kayaking</td>
<td>Works in the garden</td>
</tr>
<tr>
<td>Prefers to exercise in the morning</td>
<td>Has weights at home</td>
<td>Has tried yoga or Pilates</td>
<td>Prefers to exercise in the evening</td>
</tr>
</tbody>
</table>

Feels good after exercising, Engaged in aerobic exercise three times last week, Works in the garden
Muscle-Strengthening Exercises

To do most of the strength exercises here, you need to lift or push weights. You can use weights, resistance bands, or common objects from your home. Or, you can use the strength-training equipment at a fitness center or gym. Start with light weights and gradually increase the amount of weight you use. Note: You can find additional exercises to do at home here: [http://www.nia.nih.gov/health/publication/exercise-physical-activity-your-everyday-guide-national-institute-aging-1](http://www.nia.nih.gov/health/publication/exercise-physical-activity-your-everyday-guide-national-institute-aging-1)

Working With Weights

You don’t have to go out and buy weights for strength exercises. Find something you can hold on to easily. For example, you can make your own weights from unbreakable household items:

- Fill a plastic milk jug with sand or water and tape the opening securely closed.
- Fill a sock with dried beans, and tie up the open end.
- Use common grocery items, such as bags of rice, vegetable or soup cans, or bottled water.

Working With a Resistance Band

Resistance bands are stretchy elastic bands that come in several strengths, from light to heavy. You can use them in some strength exercises instead of weights.

Wrapping a Resistance Band

1. Lay the band flat in your hand with the end toward your pinky finger.
2. Wrap the long end of the band around the back of your hand.

How Much, How Often?

Try to do strengthening exercises for all of your major muscle groups on 2 or more days per week. But don’t exercise the same muscle group 2 days in a row.
• If you have not done strength training before, you might need to start out using 1- or 2-pound weights (or no weights at all). Your body needs to get used to strength exercises. Starting out with weights that are too heavy can cause injuries.

• It should feel somewhere between hard and very hard for you to lift the weight. It shouldn’t feel very, very hard. If you can’t lift a weight 8 times in a row, it’s too heavy for you. Reduce the amount of weight.

• Take 3 seconds to lift or push a weight into place, hold the position for 1 second, and take another 3 seconds to return to your starting position. Don’t let the weight drop; returning it slowly is very important. This is one complete movement of an exercise, or a repetition.

• Start by lifting 8 times, working up to 8–12 repetitions for each exercise. If you can’t do that many at first, do as many as you can. You may be able to build up to this goal over time.

• When you can do two sets of 8–12 repetitions easily, increase the amount of weight at the next session. Keep repeating until you can reach your goal, and then maintain that level as long as you can.

Safety

• Talk with your doctor if you are unsure about doing a particular exercise. For example, if you’ve had hip or back surgery, talk about which exercises might be best for you.

• Don’t hold your breath during strength exercises. Holding your breath while straining can cause changes in blood pressure. This is especially true for people with heart disease. Breathe regularly.

• Proper form and safety go hand-in-hand. For some exercises, you may want to start by alternating arms and work your way up to using both arms at the same time. If it is difficult for you to hold hand weights, try using wrist weights.

• To prevent injury, don’t jerk or thrust weights into position. Use smooth, steady movements.

• Avoid “locking” your arm and leg joints in a tightly straightened position. To straighten your knees, tighten your thigh muscles. This will lift your kneecaps and protect them.
• For many of the sample exercises in this guide, you will need to use a chair. Choose a sturdy chair that is stable enough to support your weight when seated or when holding on during the exercise.

• Muscle soreness lasting a few days and slight fatigue are normal after muscle-building exercises, at least at first. After doing these exercises for a few weeks, you will probably not be sore after your workout.

### Overhead Arm Raise

**This exercise will strengthen your shoulders and arms. It should make swimming and other activities such as lifting and carrying heavy items easier.**

1. You can do this exercise while standing or sitting in a sturdy, armless chair. Hold weight with palm facing upward.
2. Keep your feet flat on the floor, shoulder-width apart.
3. Hold weights at your sides at shoulder height with palms facing forward. Breathe in slowly.
4. Slowly breathe out as you raise both arms up over your head, keeping your elbows slightly bent.
5. Hold the position for 1 second.
6. Breathe in as you slowly lower your arms.
7. Repeat 8–12 times.
8. Rest; then repeat 8–12 more times.
9. As you progress, use a heavier weight and alternate arms until you can lift the weight comfortably with both arms.

### Front Arm Raise

**This exercise will strengthen your shoulders and make lifting groceries easier.**

1. Stand with your feet shoulder-width apart. Keep your feet flat on the floor during the exercise.
2. Hold weights straight down at your sides, with palms facing backward.
3. Keeping them straight, breathe out as you raise both arms in front of you to shoulder height.
4. Hold the position for 1 second.
5. Breathe in as you slowly lower your arms.
6. Repeat 8–12 times.
7. Rest; then repeat 8–12 more times.
8. As you progress, use a heavier weight and alternate arms until you can lift the weight comfortably with both arms.
### Side Arm Raise

**This exercise for your shoulders can help you put things up on a shelf or take them down more easily.**

1. You can do this exercise while standing or sitting in a sturdy, armless chair.
2. Keep your feet flat on the floor, shoulder-width apart.
3. Hold hand weights straight down at your sides with palms facing inward. Breathe in slowly.
4. Slowly breathe out as you raise both arms to the side, to shoulder height.
5. Hold the position for 1 second.
6. Breathe in as you slowly lower your arms.
7. Repeat 8–12 times.
8. Rest; then repeat 8–12 more times.
9. As you progress, use a heavier weight and alternate arms until you can lift the weight comfortably with both arms.

### Arm Curl

**After a few weeks of doing this exercise for your upper arm muscles, lifting that gallon of milk will be much easier.**

1. Stand with your feet shoulder-width apart.
2. Hold weights straight down at your sides, palms facing forward. Breathe in slowly.
3. Breathe out as you slowly bend your elbows and lift weights toward chest. Keep elbows at your sides.
4. Hold the position for 1 second.
5. Breathe in as you slowly lower your arms.
6. Repeat 8–12 times.
7. Rest; then repeat 8–12 more times.
8. As you progress, use a heavier weight and alternate arms until you can lift the weight comfortably with both arms.
Arm Curl With Resistance Band

This variation of the Arm Curl uses a resistance band instead of weights.

1. Sit in a sturdy, armless chair with your feet flat on the floor, shoulder-width apart.
2. Place the center of the resistance band under both feet. Hold each end of the band with palms facing inward. Keep elbows at your sides. Breathe in slowly.
3. Keep wrists straight and slowly breathe out as you bend your elbows and bring your hands toward your shoulders.
4. Hold the position for 1 second.
5. Breathe in as you slowly lower your arms.
6. Repeat 8–12 times.
7. Rest; then repeat 8–12 more times.
8. As you progress, use a heavier strength band.

Back Leg Raise

This exercise strengthens your buttocks and lower back. For an added challenge, you can modify the exercise to improve your balance.

1. Stand behind a sturdy chair, holding on for balance. Breathe in slowly.
2. Breathe out and slowly lift one leg straight back without bending your knee or pointing your toes. Try not to lean forward. The leg you are standing on should be slightly bent.
3. Hold position for 1 second.
4. Breathe in as you slowly lower your leg.
5. Repeat 8–12 times.
6. Repeat 8–12 times with other leg.
7. Repeat 8–12 more times with each leg.
8. As you progress, you may want to add ankle weights.
### Side Leg Raise

This exercise strengthens hips, thighs, and buttocks. For an added challenge, you can modify the exercise to improve your balance.

1. Stand behind a sturdy chair with feet slightly apart, holding on for balance. Breathe in slowly.
2. Breathe out and slowly lift one leg out to the side. Keep your back straight and your toes facing forward. The leg you are standing on should be slightly bent.
3. Hold position for 1 second.
4. Breathe in as you slowly lower your leg.
5. Repeat 8–12 times.
6. Repeat 8–12 times with other leg.
7. Repeat 8–12 more times with each leg.
8. As you progress, you may want to add ankle weights.

---

**Source:** National Institute on Aging, *Exercise and Physical Activity: Your Everyday Guide.*

My Aerobic and Strengthening Activities Log

**Note:** You can also track your physical activity at: [https://www.choosemyplate.gov/SuperTracker](https://www.choosemyplate.gov/SuperTracker)

My goal is to do **aerobic activities** for a total of **2** hours and **30** minutes this week.

<table>
<thead>
<tr>
<th>What I did</th>
<th>Effort</th>
<th>When I did it and for how long</th>
<th>Total hours or minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Mon</td>
<td>Tue</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This is the total number of hours or minutes I did these activities this week: **__ hours and __ min**

My goal is to do strengthening activities for a total of **2** days this week.

<table>
<thead>
<tr>
<th>What I did</th>
<th>When I did it</th>
<th>Total days</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mon</td>
<td>Tue</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This is the total days I did these activities this week: **__ days**

How Many Calories Does Physical Activity Use?

The number of calories varies depending on many factors including weight, age, and environmental conditions. This chart provides an estimate for the number of calories males and females may burn doing various activities for 10 minutes at a time.

<table>
<thead>
<tr>
<th>Physical Activity Level</th>
<th>Approximate Calories Burned in 10 minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Men (175–250 lbs)</td>
</tr>
<tr>
<td><strong>Moderate Physical Activity</strong></td>
<td></td>
</tr>
<tr>
<td>Ballroom and line dancing</td>
<td>50–80</td>
</tr>
<tr>
<td>Bicycling on level ground or with a few hills</td>
<td>50–80</td>
</tr>
<tr>
<td>General gardening (raking, trimming shrubs)</td>
<td>50–80</td>
</tr>
<tr>
<td>Sports where you catch and throw (baseball, softball, volleyball)</td>
<td>50–80</td>
</tr>
<tr>
<td>Tennis (doubles)</td>
<td></td>
</tr>
<tr>
<td>Using your manual wheelchair</td>
<td></td>
</tr>
<tr>
<td>Walking briskly</td>
<td></td>
</tr>
<tr>
<td>Water aerobics</td>
<td></td>
</tr>
<tr>
<td><strong>Vigorous Physical Activity</strong></td>
<td></td>
</tr>
<tr>
<td>Aerobic dance or fast dance</td>
<td>120–150</td>
</tr>
<tr>
<td>Biking faster than 10 miles per hour</td>
<td>120–150</td>
</tr>
<tr>
<td>Heavy gardening (digging, hoeing)</td>
<td>120–150</td>
</tr>
<tr>
<td>Hiking uphill</td>
<td></td>
</tr>
<tr>
<td>Jumping rope</td>
<td>120–150</td>
</tr>
<tr>
<td>Martial arts (such as karate)</td>
<td></td>
</tr>
<tr>
<td>Race walking, jogging, running</td>
<td></td>
</tr>
<tr>
<td>Sports with a lot of running (basketball, hockey, soccer, singles tennis)</td>
<td></td>
</tr>
<tr>
<td>Swimming fast or swimming laps</td>
<td></td>
</tr>
</tbody>
</table>

Source: Adapted from Move Virginia, Calories Burned During Physical Activities.  
http://www.move.va.gov/download/NewHandouts/PhysicalActivity/P03_CaloriesBurnedDuringPhysicalActivities.pdf
# Physical Activity Is Key to Living Well Evaluation

<table>
<thead>
<tr>
<th>1=Strongly Disagree</th>
<th>2=Disagree</th>
<th>3=Neither Disagree or Agree</th>
<th>4=Agree</th>
<th>5=Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The workshop covered useful information.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. The workshop activities were helpful.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I plan to increase my physical activity and record it on the log this week.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. I plan to change my eating habits based on the information I learned today.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. I plan to become more active based on the information I learned today.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. The instructor presented the information in a helpful way.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Overall, I found the workshop to be very helpful.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Please tell us which materials you found most useful.</td>
<td>comments:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Chapter 16: Job Training and Adult Education (HiSET)

As an organization representing your community you can reach groups of people that might otherwise be missed. Every community benefits from education and employment of more people. This section will provide details on how to help ex-offenders, the homeless, people with disabilities, veterans, and others enter the workforce. It also gives details on helping community members graduate high school (pass the HiSET).

**Goodwill Industries:**

"Since 1947, Goodwill has helped thousands of individuals with disabilities and other barriers onto a path toward reclaiming their independence. They operate three divisions: contracts, retail and workforce development. Each contributes to the community and well-being of others in an important and diverse way. Goodwill serves 23 parishes throughout Southeastern Louisiana." ¹

**Ex-offender Generation 5 Re-entry Program:**

This program is designed to prepare ex-offenders for reentry into the workforce. To be eligible for participation individuals must be released from the Louisiana Department Correction, Federal Prison System or City/Parish prison. Individuals must be living in Orleans, Jefferson, St. Bernard, Plaquemines or River Parish. The program offers several services including: Vocational Certification Job Training Program, Work Readiness, Healthy Living and Life Skills, Computer Literacy Training, Academic Preparation of all Levels, Mentoring, Case Management, Career Exploration, Job Placement Assistance, and Supportive Services.¹

**Additional criteria for eligibility:**

- Released from Department of Corrections on or after April 4th, 2012
- At least 17 years of age
- Registered with Selective Services [www.sss.gov](http://www.sss.gov)
- Own means of transportation, whether by private means or access to public transportation
- Stable and taking medication (if applicable) if a mental condition is present
- Underemployed or unemployed
• Participating in the Mentorship Component of the Program
• Valid Louisiana Photo ID
• Copy of Social Security Card and Birth Certificate
• Proof of Income (if applicable)
• Proof of Release Date
• Cannot have been convicted of a Sex Offense

Services and Training program specifics: Below are brief descriptions of the various programs Goodwill Industries offers. Programs specific to ex-offenders include: Bio-Diesel Training, C-Tech (Broadband) Training, Culinary Arts, and Hospitality (START).

Beyond Jobs: "Goodwill is helping women connect to a better job and brighter future with its Beyond Jobs program, funded by the Walmart Foundation. Services are available in both Baton Rouge (225-308-0220) and New Orleans (504-456-2622) offices, providing the following.

• A complete career assessment
• Individualized career planning
• Connections to employment opportunities
• Training programs and resources to support participant success
• Financial education and resources to help participants reach long-term goals
• Support services to help participants advance their career"

Bio-Diesel Training: "Teaches participants about bio-diesel plant operations and general safety training. A test will be administered at the end of training and certification is awarded upon completion."

Computer Basic Skills Training: "Learn how to use computers, the Internet, and use these skills to find a career. Classes are $10 per session and cover the following topics: Computer and Internet Basics, Email & Online Safety (prerequisite: Computer & Internet Basics), Completing Online Forms, Windows Operating System, Microsoft Word and Microsoft Excel. Classes are on Learner Web, which is a self-paced learning program. With the help of tutors, you can take free online classes at Goodwill’s Training Center or at community partner labs throughout the city."

C-Tech (Broadband) Training: "Teaches participants about various connectively technologies including telephone, cable TV, computer network industries and other communication outlets. Each course is 45 hours and participants receive certification upon
completion of each course."1 Other similar programs include: Telecommunications Technologies, Network Cabling Specialist (Copper and Fiber Optic), Voice Communications Professional, and Smart Home Professional (Audio/Visual and Energy Management). Call the Workforce Development Office at 504-456-2622 to learn more. Goodwill offers the following certification programs.

- Telecommunications Technologies
- Network Cabling Specialist—Copper
- Network Cabling Specialist—Fiber Optic
- Voice Communications Professional
- Smart Home Professional—Audio/Visual
- Smart Home Professional—Energy Management¹

*Culinary Arts:* The program covers many aspects of cooking to adequately prepare them for entry into the culinary field. The course is between 8-12 weeks. "Participants receive certification from the American Culinary Federation upon successful completion of the program. Support staff includes case managers and job coaches, as well as employment assistance coordinators."¹

Students are taught:

- Food rules and regulations, how to operate equipment, utensils and food preparation
- Proper storage techniques and sanitation principles
- Soup, sauces, baking, food preparation, breakfast cookery, and basic cuts of meat and butchery.
- Receiving and storage practices
- Regional cuisine and basics of large scale food production¹
**Edible Enterprises:** This company is "one of the largest and fastest growing food technology incubators in the country, opening the door of opportunity for local cooks to prepare their unique foods in company kitchens. Kitchens are approved for commercial production by DHH. Space can be rented by the hour on a first come first served basis. Other fee-based services include production, packaging, distribution and marketing consultation."\(^1\)

**Floor care Technician:** "Classroom and work experience training provided in the areas of safety and OSHA regulations, measurements and chemicals, and specialization in the areas of hospitality housekeeping, food service sanitation, commercial and industrial housekeeping. 80% of the training is hands-on with pads, equipment, and strategies to give the student basic knowledge of stripping, sealing, and waxing, and buffing tile floors. Carpet care provides hands on experience in vacuum and spot cleaning. Graduates of this program may seek employment opportunities in housekeeping, custodial positions in hotel/motel industries, food service industries, and commercial and industrial sites."\(^1\)

**Hospitality (START):** Skills Tasks and Results Training (START) "provides training for hospitality positions in the rooms, food and beverage divisions of a lodging operation, front desk work, reservations, housekeeping, bell services, restaurant services, and banquet setup. Training is 11 weeks. Participants receive certification upon successful completion of the program."\(^1\)

**Youth Mentoring Program:** "Goodwill’s Youth Empowerment Program, formally known as GoodGuides, helps youth, ages 12-17 stay in school, develop work skills, explore career paths and helps them get into college. Goodwill’s Youth Empowerment Program helps boys and girls ages 12 to 17 who face risk factors such as school failure, family violence, homelessness or other challenges. Individuals are matched with caring mentors who lend a supportive ear, coach and lead the youth to resources that help them build career plans and set educational goals. For application information, contact Tonya Carmouché at (504) 457-2277 or Nicole Espandron at (504) 889-5552 to sign up or for more information."\(^1\)
Goodwill Industries Resources:

*New Orleans Location -*

Goodwill Industries of Southeastern Louisiana, Inc.
3400 Tulane Avenue, Suite 1000
New Orleans, LA
Phone: (504) 456.2622
Fax: 504.456.2698

*Baton Rouge Location -*

Baton Rouge Goodwill Industries Workforce Training Center Location
647 Main Street
Baton Rouge, LA. 70801
Phone: 225.308.0220

*Website* - [http://www.goodwillno.org](http://www.goodwillno.org)

*Service and program information* - [http://www.goodwillno.org/services/](http://www.goodwillno.org/services/)

Local job training organizations:

**Liberty’s Kitchen:**

"Liberty’s Kitchen is a social enterprise dedicated to transforming the lives of New Orleans youth by providing a path to self-sufficiency through food service-based training, leadership and work-readiness programs."2

*About the Youth Development Training Program:*

"The Liberty’s Kitchen Youth Development Program is designed for New Orleans youth between the ages of 16-24, who are out of work and out of school. The risk factors for these young people include higher poverty rates, low educational attainment, a lack of work skills and experience, and mental health and substance abuse issues. Many of our young people have been involved in the criminal justice system and almost all have been touched by the violence which continues to be endemic to our city.

We utilize our food service-based businesses to teach and provide experiential learning for our trainees. This innovative program provides participants with comprehensive workforce and soft skills training along with an appreciation for quality, whole and freshly-prepared food. 85% of our Youth Development Program participants are employed on graduation and 75% are still employed at the sixth month benchmark."2
The Youth Development Program combines the following 4 components.

- **"Social and Soft Skills Training"** teaches students personal responsibility and how to make positive choices for themselves and their community. Our life skills curriculum covers topics ranging from anger management to financial literacy.

- **Occupational Skills Training** takes place in our food service-based businesses — providing a safe and secure environment to learn basic culinary and employability skills through hands-on, real-world experience. Our range of food service-based businesses together with our made-from-scratch cooking methods ensure that our participants receive experiential training in the culinary skills necessary to transform fresh, whole ingredients into wholesome and healthy meals.

- **Individual Case Management** provides wrap around support services focusing on social issues such as housing needs, day-care issues, educational goals and financial literacy. Program staff work with students to create an Individual Development Plan outlining their personal goals and the necessary steps to achieve those goals. Our onsite Social Worker provides mental health services to assist our students with the psychological and social service issues that prevent their advancement to a more productive life.

- **Job Placement and Transition Services** means finding appropriate employment for our students – our graduates are prepared to step in and thrive not only in the culinary and hospitality industries, but many other industries as well. And to insure success, Liberty’s Kitchen works with our graduates for one full year after program completion to enable job retention, continuation of any needed social services and/or completion of education goals."

**Contact them:**

300 North Board Street  
New Orleans, LA 70119  
Phone number: 504-822-4011  
Email: info@libertyskitchen.org

**Cafe Hope:**

**About Cafe Hope’s Youth Program:**

"Cafe Hope is a Southern Louisiana Farm to Table restaurant that centers on serving the young adults of the Greater New Orleans area. At its heart, Cafe Hope works to meet the needs of at-risk youth so they can further themselves along the path to self-sufficiency and have fulfilling futures as valuable members of their community. To achieve this, the primary focus is real life job training during the restaurant internship, when students develop skills they can bring to any job in the restaurant and hospitality industry. The Cafe
Hope staff also recognizes that there is more to self-sufficiency than job skill development. Because of this, students participate in intensive life skills classes and devote significant time to education. Guest speakers also present on financial literacy, dressing for success, nutrition, and spirituality.” Program participants must be between ages 17-24 and be "serious about learning on-the-job skills in the kitchen and on the floor of a fully operating restaurant.”

**Contact Information:**

1101 Barataria Blvd.
Marrero, LA 70072
Phone number: 504-503-0203
Email: garin@cafehope.org

**Cafe Reconcile:**

**About Cafe Reconcile’s Youth Program:**

"We are a community of concerned people committed to addressing the system of generational poverty, violence and neglect in the New Orleans area. Our innovative life skills and job training program assists young people (ages 16–22) from severely at-risk communities who desire to make a positive change in their lives. Reconcile’s students arrive facing a vast array of challenges, from extreme poverty and high school attrition to homelessness, violence, and participation in the juvenile justice system. Nonetheless, these young people possess a deep desire to break the cycle and become productive, contributing members of society.

The program utilizes the 21st Century Success Principles curriculum, developed by the New Orleans Jobs Initiative over a ten-year period, which addresses participants’ understanding of workplace culture and is tailored for African-American youth with little connection to the labor market. We also provide personalized and comprehensive case management services to help students overcome obstacles such as unstable housing and unreliable transportation. Outside referrals enable students to address substance abuse issues, pursue domestic violence counseling, and obtain legal assistance.”

**Contact Information:**

1631 Oretha Castle Haley Blvd
New Orleans LA 70113
Phone number: 504-568-1157

The following is a list of entry-level jobs in healthcare, fitness, and foodservice that generally do not require formal education:

**Healthcare jobs:**
• Home care aide
• Medical assistant/biller/secretary
• Nursing assistant
• Occupational therapist aide, Psychiatric aide

Fitness jobs:
• Coach
• Class Instructor
• Personal trainer

Food service jobs:
• Baker
• Bus person
• Chef (entry-level)
• Counter server
• Host/hostess
• Restaurant waiter
• Various positions with a catering company

**Adult education:**  
**About the HiSET:**

The HiSET (High School Equivalency Test) is a new exam option for students as an alternative to the GED (General Education Development exam). Similar to the GED, the five subject areas of the test are mathematics, reading, writing, social studies, and science. The HiSET exam is more flexible, accessible, and affordable. It can be taken in multiple formats and multiple languages. There are a number of accommodations for test takers with disabilities and health-related needs. At the moment it is only offered in a handful of states, but luckily Louisiana is one of them. There are numerous testing centers throughout the state which offer the exam on a regular basis. The exam is offered most days when the test centers are open. Registration is required prior to the day a student plans on taking the exam.5

**Cost:**

Registration for the HiSET exam costs less than the GED test and includes more. With registration students get two free retakes when purchasing a battery (all five subtests) and access to test preparation. To take the entire test (battery) including all five subjects, there is a registration fee of $90. The ETS exam battery fee is $50, the test center fee is $30, and annual state administration fee is $10, together equaling $90. There is the option of taking sections separately (subtests). The fee for the first subtest is $31.5"Additional subtests and/or retests taken within a 12-month period of paying the annual state administration fee will be charged $21 per subtest."5 Test takers must pay online or by phone. Cash cannot be used to cover registration fees, however there are options for those who only have cash
available to pay for the test. Find out more information on payment methods, refunds, testing options, scheduling, and other test information at http://hiset.ets.org/requirements/la.5

"Once you pass the HiSET exam, you will have the valuable state-issued credential you need to advance your career or continue your education."2 The HiSET site offers free sample questions, practice test, and tips to help students prepare. They provide services and reasonable accommodations for test takers with disabilities or health-related needs who meet the requirements.5

Main site for HiSET exam: http://hiset.ets.org/test_takers

For more information on requirements specific to Louisiana: http://hiset.ets.org/requirements/la

Eligibility and details of the HiSET exam:

• Must be 16 years or older to register and not currently enrolled in school
• If between the ages 16-18 must also provide proof of withdrawal of school or enrollment in and/or authorization by an approved WorkReady U literacy program
• Residency in Louisiana is not required
• A passing score on the half-length High School Equivalency Practice Test
• Those over 19 years old do not have to take and pass a practice exam
• All test-takers must provide a valid state/government-issued ID including: driver’s licenses, passports, and military IDs.
• Test-takers must pass each of the 5 subject areas
• There is a registration fee of $90 for the entire test
• HiSET exam is offered most days when test centers are open
• Test centers in New Orleans include: Jefferson Parish School System Adult Education Building, Delgado Community College (City Park), Delgado Community College (Westbank), St. Bernard Parish School System, St. Charles Parish School System Professional Learning Center, South Central LA Tech College Reserve, South Central LA Tech College Thibodaux, Northshore Technical Community College, Terrebonne Parish School System Schriever Main Campus, Terrebonne Parish School System Houma, Southeastern Louisiana University, and River Parishes Community College.5
**Delgado Community College:** This school offers both traditional and online courses to prepare students for the HiSET exam and practice exam.

1. *Traditional HiSET preparation course:*

"The Adult Education Program at Delgado Community College is an open enrollment, free program serving students in the New Orleans area seeking to take the HiSET exam. With classes offered at four academic sites throughout the city, and sections that meet in the mornings, afternoons, and evenings, most students are able to find a class schedule that works. And with twenty-four qualified instructors and tutors, the Adult Education Program is ready to help prepare students to earn a high school diploma." As explained above, passing a practice exam is required for those under 19 years of age. Delgado's course prepares students for the practice exam and offers the exam at the end of the course.

There are five registration dates throughout the year for the program. Anyone age sixteen or older may register at the City Park Campus in Building 2, Room 108 on registration days. To receive more information on registration call 504-671-5434. Class locations in the Metro New Orleans area include City Park Campus, Mid-City, Jefferson Campus in Metairie, and the West Bank.

2. *Online HiSET preparation course:*

The eLearn Adult Education Program at Delgado Community College is an online preparation course offered to get students ready for the HiSET exam. Just as the traditional class, the online offering is free with the intention of equipping students with the reading, language, and math skills necessary to successfully earn a high school equivalency diploma.
(formerly the GED, now the HiSET) and transition towards various college and career pathways. All aspects of this course are online and can be completed on your own time. Similar to the traditional Adult Education course, "all new students take a placement test to determine their academic level. After completing the placement tests, eLearn students will complete all coursework online."5

For more information on the online course visit: http://www.dcc.edu/academics/adult-ed/online_classes.aspx

For general Delgado information visit: http://www.dcc.edu/academics/adult-ed/default.aspx

References:


Chapter 17: Resource guide

Key resources by toolkit section:

About the PRC:
- Tulane Prevention Research Center - http://prc.tulane.edu

Defining a Community:
- Fit and Healthy Vermonters - http://healthvermont.gov/fitandhealthy.aspx
- The Data Center (formerly The GNO Community Data Center) - http://www.datacenterresearch.org

Groundwork:
- Community Tool Box - http://ctb.ku.edu/en
  - Table of contents to access various sections - http://ctb.ku.edu/en/table-of-contents

Assessing Community Needs:
- AARP Create the Good - http://www.createthegood.org
  - AARP How to Build a Caring Network - http://www.createthegood.org/toolkit/build-caring-community-network
- Cal SWEC - http://calswec.berkeley.edu
  - Implementation Toolkits (find links to assessment tools here) - http://calswec.berkeley.edu/toolkits/implementation-toolkits/assessment-tools

Finding a Project Leader:
• AARP Create the Good - http://www.createthegood.org
  • Nuts and bolts for project organizers - http://www.createthegood.org/toolkit/nuts-bolts-project-organizers

Evaluating Projects, Programs, and Interventions:

• National Council of Nonprofits - http://www.councilofnonprofits.org

Sustainable Communities and Organizations:

• Sustainable Measures - http://www.sustainablemeasures.com/sustainability

501(c)(3) Information:

• Internal Revenue Service - www.irs.gov
  • Exemption Requirements 501(c)(3) - http://1.usa.gov/1gT6nR3

Fundraising and Money Sense:

• GRANTS.GOV – www.grants.gov
• Nonprofit Accounting Basics - http://www.nonprofitaccountingbasics.org
  • Reporting and Operations (The Budgeting Process) - http://www.nonprofitaccountingbasics.org/reporting-operations/budgeting-process
• Society for Nonprofits (Readiness Checklist) - http://www.snpo.org/funding/rateyourself.php

Collaboration:

• City of New Orleans - www.nola.gov/nopd/
• Quality of Life Officers and Community Coordinators -
• Independent Police Monitor (View annual reports, file a complaint, commend an officer, and learn more about the Independent Police Monitor) - www.nolaipm.org
• New Orleans City Council (Meet the Council) -
  www.nolacitycouncil.com/meet/meet.asp
• Public Guide to the New Orleans City Council -
• New Orleans Self-Reported Neighborhood Associations -
  https://data.nola.gov/Geographic-Reference/Self-Reported-Neighborhood-Association-Boundaries/t2b3-x5hi
• List of Neighborhood and Community Organizations from the City’s Office of Neighborhood Engagement - http://www.nola.gov/neighborhood-engagement/organizations/

**Website Design:**

• Bitly (URL shortener) - https://bitly.com/

**Blight and Adjudication Process:**

• Blight Resource Guide 2014 -
  http://nolablightheader.files.wordpress.com/2014/06/brg-design-draft-online1.pdf
• BlightStatus (interactive map of blighted properties)- http://blightstatus.nola.gov/
• City of New Orleans
  • Historic District Maps & Location Information -
    http://www.nola.gov/hdlc/map/
  • Building Permits & Licenses - http://www.nola.gov/onestop/building
• Demolition Permits -
  http://www.nola.gov/onestop/building/demolition/demolition-permit/
• City of New Orleans Property Viewer - Property.nola.gov
• Home Builders Association of Greater New Orleans - http://www.hbago.org
• Housing Code Enforcement (A Handbook for New Orleans Residents) -
• Jericho Housing Vacant Land Site Strategies for New Orleans -
• Louisiana Appleseed - http://appleseednetwork.org
  • Protect Your Property Heir Property in Louisiana -
    http://www.appleseednetwork.org/wp-content/uploads/2012/05/Protect-Your-Property.pdf
• NOLA 311 - http://www.nola.gov/311
• NOLA Blight Organization Toolkit - http://nolablighttoolkit.com

Health of the Community:

• 2013 New Orleans Bike Map and Guide to Safe Cycling (Bike tips and bike lane map) -
• Bike Easy (Bike lanes, projects, and advocacy efforts in New Orleans) -
  http://bikeeasy.org
• City Park New Orleans (Walk, Bike, Run) - https://neworleanscitypark.com/in-the-park/walk-bike-run
• Fit NOLA Partnership Shared Action Blueprint -
  http://www.nola.gov/nola/media/Health-Department/Healthy%20Lifestyles/Fit-NOLA_Book.pdf
• Dietary Guidelines Eat Healthy Be Active Community Workshops -
  http://www.health.gov/dietaryguidelines/workshops/
  • Eat Healthy Be Active Community Workshop Introduction -
- Eat Healthy Be Active Community Workshop Complete Set -
  http://www.health.gov/dietaryguidelines/workshops/DGA_Workshops_Complete.pdf
- LSU Health Sciences Center (A Lifelong Guide to Wellness and Prevention) -
  http://alliedhealth.lsuhsc.edu/ot/docs/wellnessbook06182013FINAL.pdf
- The Michigan Healthy Communities Collaborative - www.mihealthtools.org
  - Healthy Community Checklist -
    www.mihealthtools.org/checklist/Healthy_Community_Checklist.pdf
  - Healthy Communities Tool Kit -
    http://www.mihealthtools.org/documents/HealthyCommunitiesToolkit_web.pdf
  - Nutrition Environment Assessment Tool (NEAT) -
    www.mihealthtools.org/neat/
  - Nutrition Environment Assessment Tool PDF -
  - NEAT Action Plan -
- The Surface Transportation Policy Partnership: http://transact.org

**Job Training and Adult Education (HiSET):**

  Goodwill Industries - www.goodwillno.org
  - Workforce Development - http://www.goodwillno.org/services/
- HiSET Exam Site - http://hiset.ets.org/test_takers
Additional Resources:

NOLA CPP Neighborhood Association Manual -
http://nolacpp.files.wordpress.com/2013/02/neighborhood-manual-final2.pdf

NOLA for Life Program Guide (Programs include Case Management, Education, Employment/Job Training, Housing, Legal Aid/Advocacy, Mental Health, Nutrition Assistance, and Substance Abuse) - http://www.nolaforlife.org/strategy/initiatives/