**Guide for Documenting Health Promotion Initiatives**

**PAHO Health Promotion Effectiveness Working Group**

**Guide for Documenting**

**Health Promotion Initiatives**

1. **CONTACT INFORMATION**

1. Submission date of this report

2. Your Contact Information

(Name)

(Position)

(Organization)

(Address)

(City)

(State/Province/Department)

(Zip Code)

(Country)

(Phone No.)

(Fax No.)

(Email)

(Website)

3. Contact information lead/implementing organization

(Name)

(Position)

(Organization)

(Address)

(City)

(State/Province/Department)

(Zip Code)

(Country)

(Phone No.)

(Fax No.)

(Email)

(Website)

4. Contact information partner /involved organizations

(Name)

(Position)

(Organization)

(Address)

(City)

(State/Province/Department)

(Zip Code)

(Country)

(Phone No.)

(Fax No.)

(Email)

(Website)

4. Contact information partner/involved organizations (continued)

(Name)

(Position)

(Organization)

(Address)

(City)

(State/Province/Department)

(Zip Code)

(Country)

(Phone No.)

(Fax No.)

(Email)

(Website) Many other contacts not included here

1. **INITIATIVE SUMMARY**

5. Title/name of the initiative

6. Purpose(s) or objective(s)

6.1 Issues addressed by the initiative

7. Expected outcome(s)/result(s)

8. Time frame

Comments

9. Stage of Implementation

10. Geographic coverage

11. In what setting is/was the initiative being implemented?

Name of setting or description

12. Briefly describe, in approximately 250 words, initiative.

1. **GENERAL CONTEXT**

13.A What were the characteristics of the setting (BASELINE - before implementation of the initiative)?

Demography (population profile)

Population health profile

Political context

Socio-economic conditions

Socio-cultural

Citizenship-level of participation of various stakeholders

13. B What are the characteristics of the setting following implementation of the initiative? If the initiative is ongoing, what changes have been observed?

Demography (population profile)

Population health profile

Political context

Socio-economic conditions

Socio-cultural

Citizenship - level of participation of various stakeholders (i.e. individuals, community, local authorities,

government agencies, private sector)

14. Why was this initiative started? Check all that apply and explain briefly.

In response to an unmet need

In response to a crisis

In response to an opportunity

In response to a political request

In response to citizen/community action

In response to a funding opportunity

Initiated by an individual on behalf of an organization

Other (please state)

15. Was the design of this initiative guided by any strategies/models or frameworks?

Yes (please describe below)

**IV. FINANCING**

16. What was/is the budget for the initiative/What funds were available for this initiative?

Start up $

Annual $

Total (if completed) $

17. What were/are the sources of funding (check all that apply and state amounts received)?

Government

Fundraising

Agency budget

NGO

Private Sector

Donor

Other

18. Describe any non-financial resources that were made available to implement the initiative

(including community assets).

Human

Material .

Other

19. Were/are the financial resources available for this initiative adequate to accomplish the expected results?

20. Were/are the non-financial resources provided for this initiative adequate to accomplish the expected results?

**V . PROCESS/PARTNERSHIPS**

21. Who were/ are the key partners involved in this initiative (people, organizations, institutions and what were/are their main roles and responsibilities?

22. Did the participation of these partners change over time?

23. Were new partnerships developed during the implementation of the initiatives?

**VI. STRATEGIES**

24. What strategies have been/are being used to achieve the results/outcomes thus far? (check all that apply)

Participation

Advocacy

Partnerships/collaborations/intersectoral action

Building leadership

Creating supportive environments

Empowerment/Capacity Building

Improve access to resources/services

Public Policy

Other Strategies not identified above

Communications and Public Relations

A. Participation (stakeholder/target audience)

(Were there previous experiences with social participation and/or mobilization in this setting or with this population?)

(What was done to get people involved and to participate?)

(How long did it take before people started participating?)

(What challenges did the initiative face in mobilizing participation?)

(For each challenge what was done to overcome it?)

(What was achieved through participation?)

(What process was used to measure the effectiveness of this strategy?)

B. Partnerships/collaboration/intersectoral action

(Describe the type of partnerships that were established during this initiative.)

(What strategies helped to develop and maintain these partnerships?)

(How long did it take to develop these partnerships, and how long have they been maintained?)

(What challenges did the initiative face to develop and maintain these partnerships? )

(What was achieved through these partnerships?)

(What evaluation process was used to measure the effectiveness of this strategy?)

C. Empowerment/Capacity building

(What was done to build capacity at the individual level?)

(What was done to build capacity at the community level?)

(What was done to build capacity at the organizational level?)

(What leadership evolved as a result of this empowerment/capacity building strategy?)

Did these efforts bring about change?

No

Yes, please explain below

(Did these efforts bring about change?)

(How long did it take to create change by using this strategy?)

(What challenges did the initiative face while implementing capacity building activities?)

(What was achieved by building capacity?)

(What evaluation process was used to measure the effectiveness of this strategy?)

D. Public Policy

(Did the initiative contributed to the development or modification of any public policy? If yes, please list and briefly describe.)

(What was the process to develop new policies or change existing policies?)

(How long did it take for these public policy changes to occur?)

(What challenges did the initiative face when developing or changing these public policies?)

(What was achieved through these changes in public policy?)

(What evaluation process was used to measure the effectiveness of this strategy?)

E. Communications and Public Relations

(How was information about the initiative given to and received from people involved in implementing the project?)

(How was information about the initiative given to and received from intended participants/partners?)

(Which communication tools/methods were most useful and why?)

(Which communication tools were least useful and why?)

( What challenges did the initiative face that relate to communicating and sharing knowledge, and how were they addressed? )

(What was achieved through communication and knowledge transfer?)

(What evaluation process was used to measure the effectiveness of this strategy?)

F. Advocacy

(What advocacy-related activities were carried out during the initiative?)

(How were these advocacy-related activities carried out?)

(What challenges did the initiative face that relate to advocacy, and how were they addressed? )

(What was achieved through these advocacy efforts?)

(What evaluation process was used to measure the effectiveness of this strategy?)

G. Building leadership

(Did the initiative use any pre-existing leadership structure (coalitions, committees, community groups)? Please explain.)

(What was the leadership structure used or set up to implement and maintain this initiative?)

(How did this leadership develop and evolve?)

(Was the leadership structure effective for the implementation of the initiative?)

Yes ( What worked and why did it work?)

No (What did not work & why?)

(Has the leadership structure facilitated the sustainability/ continuation of the initiative? Please explain how.)

(What evaluation process was used to measure the effectiveness of the leadership structure?)

H. Creating supportive environments

(Were any supportive environments created as a result of the initiative?)

No

Yes (if yes please explain briefly below)

(How were these supportive environments created?)

(What challenges did the initiative face in creating supportive environments, and how were they addressed?)

(How long did it take to create the supportive environments?)

(What was achieved through creating supportive environments?)

(What evaluation and monitoring strategies were used to measure the effectiveness and follow the process of developing healthy settings?)

I. Improving access to resources/ services

(What improvements were made to increase access to resources/services?)

(How were these changes made?)

(What challenges did the initiative face that relate to improving access to resources, and how were they addressed?)

(What was achieved by increasing access to resources?)

(What evaluation process was used to measure the effectiveness of this strategy?)

J. (Other strategies not mentioned: Please specify strategy(s) used )

(Please describe and give an analysis similar to the other strategies.)

25. List any other challenge(s) not mentioned above and give an account of how it/they were overcome

26. List and describe any other actions/ strategies that contributed positively or negatively to this initiative

**VII. OUTCOMES**

27. What are the notable achievements/results/outcomes from this initiative (list in bullet format)?

28. Which Millennium Development Goal(s) Plus did the initiative contribute to, if any?

(check all that apply and explain briefly)

1. Eradicate extreme poverty and hunger

2. Achieve universal primary education

3. Promote gender equality and empower women

4. Develop a global partnership for development

5. Improve maternal health

6. Combat HIV/AIDS, malaria and other diseases

7. Reduce child mortality

8. Ensure environmental sustainability

MDG + Combat Chronic Non Communicable Diseases and their risk factors

Violence & injury prevention

Road traffic injuries

Tobacco use and exposure to second hand smoke

Abuse of alcohol and other substances

Unhealthy diet and obesity

Physical inactivity

Hearing & visual impairment

Mental health

Disabilities/rehabilitation

Other

29. At what levels did the initiative make changes? (check all that apply and describe briefly)

Individual

Community

Policy

Organizations and Institutions

30. Which change was most important and why?

31. If applicable, has the initiative been sustained/continued beyond the project timeframe?

32. Describe the evaluation process used to measure and improve the initiatives progress

33. What were the main lessons learned from this initiative?

(Planning)

(Implementation)

(Evaluation)

(Sustainability)

34. What recommendations can you give for improving this and future similar health promotion initiatives?

35. Please list and attach copies of any material and or other tools produced to support this initiative.

36. Please list and attach any photographs that capture significant stages and achievements of this initiative: