



## STEP 1 Understanding the Recommended Approach to Preventing Childhood Obesity

### HOW TO USE THIS GUIDE

Are you interested in preventing childhood obesity? This guide will help you assess the effectiveness of the nonprofits you are considering supporting. It is based on Social Impact Research's (SIR) methodology for analyzing nonprofits, which identifies the best approaches for addressing the targeted social issue. For more information, read SIR's social issue and state reports on preventing childhood obesity.

An effective nonprofit should incorporate all three components of the recommended approach – or partner with other organizations to cover the full range of services represented by these components. In addition, effective nonprofits should collect data to measure the outcomes and impact of their programs.

- A. Education about health habits
- B. Experience in a healthy lifestyle
- C. Outreach to parents and caregivers
- D. Outcomes and Impact

SIR determined that as part of a holistic community initiative, programs using the recommended approach (described below) to improve childhood nutrition and physical activity provide a good opportunity for donors and funders interested in preventing childhood obesity. SIR has developed separate guides for each intervention, as most organizations do not focus on both areas. This is a guide to evaluate **physical activity** programs. Many physical activity programs refer to themselves as fitness, wellness, or healthy habits programs rather than obesity prevention programs.

### DEFINITION

Childhood obesity prevention encourages development of healthy eating and exercise habits in children ages 2 to 19 that will keep them from becoming overweight or obese. Addressing this issue requires holistic community initiatives that include policy and environmental changes, as well as programs that educate individuals about healthy behaviors. This report concentrates on the educational component, which enables healthy habits to be developed and sustained.

### COMPONENTS OF THE RECOMMENDED APPROACH

Physical activity programs vary widely. SIR has found that high-quality programs have the following components:

- Education about healthy habits to inform children and adolescents about nutrition and physical activity
- Experience in a healthy lifestyle that exposes children and adolescents to recommended activities
- Outreach to parents and caregivers who can facilitate and model healthy habits

To be most effective, successful direct service educational programs should operate as part of a community initiative that is simultaneously addressing needed policy and environmental changes for a healthier community.

See our social issue report for more information.

## STEP 2 Evaluate the Program's Effectiveness through the Lens of the Recommended Approach

### A. Evaluate the quality of education

The education component of a physical activity program must reflect the needs of participants and the communities in which they live, and consider duration and intensity.



### Examples of EXCEPTIONAL IMPLEMENTATION

Participants are taught to be peer educators, enabling ownership of the curriculum

Program considers how it can make the most impact; summer months when children do not have daily recess, are a key time for physical activity programs

#### EFFECTIVE IMPLEMENTATION

- ✓ Curriculum is created based on current scientific data and community needs, with expert input (e.g., physical therapists) and updated at least annually as new guidelines emerge
- ✓ Organizations directly teach participants about physical activities
- ✓ Program is at least six weeks; structured as a cohort model

#### INEFFECTIVE IMPLEMENTATION

- ✗ Curriculum is created without consulting experts or recent federal physical activity guidelines, and the needs of the community are not considered
- ✗ Curriculum information is available online or in brochure form only
- ✗ Program is less than six weeks; participants opt in or out of each class

## B. Evaluate the quality of experiences

Participating in physical activities ensures that maximum energy is expended and participants learn the health benefits of physical activity.



### Examples of EXCEPTIONAL IMPLEMENTATION

Physical activities are vigorous, with all participants active for the entire experience (e.g., soccer, dance, circuit training, hula hooping)

Tools are provided for participants to monitor their activity outside the program; for example, using heart rate monitors, activity logs, or pedometers

#### EFFECTIVE IMPLEMENTATION

- ✓ Adults engage in and supervise physical activities that have at least a moderate level of inclusion and vigor. Some children might not be participating all the time (e.g., baseball, rock climbing)
- ✓ At least 30 minutes of physical activity each session
- ✓ Expert guests such as athletes, sports therapists, families, and community members demonstrate and participate in activities
- ✓ Organization measures progress *during* program to ensure participants understand connection between physical activity and their bodies

#### INEFFECTIVE IMPLEMENTATION

- ✗ Program provides equipment or space, but does not actually engage in the activity with participants. Or program focuses on physical activities where few children are moving at once
- ✗ Less than 30 minutes of physical activity each session
- ✗ Curriculum is taught entirely by program staff without any demonstrations or guest participation
- ✗ Activities are not monitored or evaluated, and participants are not shown the connection between their physical activity and their bodies

## C. Evaluate the quality of outreach

Creating opportunities for parent and caregiver involvement enables families to make more physically active choices, and ultimately empowers parents to advocate for change.



### Examples of EXCEPTIONAL IMPLEMENTATION

Program includes a “workday” where participants and families do community improvement projects

Participants share knowledge by creating and placing posters throughout the community

#### EFFECTIVE IMPLEMENTATION

- ✓ Parents are invited to competition days or events to showcase participants’ newly gained skills
- ✓ Program offers activities for the entire family, such as family hikes and bike rides

#### INEFFECTIVE IMPLEMENTATION

- ✗ Parents are not invited or encouraged to attend events
- ✗ Program does not regularly include activities for entire families

## D. Evaluate outcomes and impact

Evaluating outcomes and impact is difficult for physical activity programs because of the controversy surrounding measurement tools such as Body Mass Index (BMI) and their use on children. Restrictive federal and state funding, as well as school district guidelines on what data can be gathered from students, makes it difficult to evaluate programming.

Therefore, high-performing physical activity programs measure behavioral changes in participants, parents, and caregivers.\* If the program is in a school, additional outcome indicators, such as classroom behavior, can be measured. Some of the many behavior change indicators are:

Indicator	Expected Outcome Rate
Increase in daily physical activity outside of the program	rate varies**
Percentage of parents and caregivers who say their family is more physically active as a result of the program	rate varies**
Percentage of teachers who report improved classroom behavior as a result of increased physical activity	rate varies**

Collecting outcome data enables organizations to know whether or not their programs are effectively improving the lives of their participants over the long term. High-performing organizations collect and analyze a wide variety of data to measure the effectiveness of their programs and the health of their organizations. Organizations use this data to build upon their successes and improve upon their weaknesses.

\*Exceptional programs also collect data on community-level change, such as parents’ successful lobbying for more pedestrian walkways

\*\*There is no average or ideal rate of change for physical activity. The rates that constitute progress in these areas should be a discussion between the organization, participants, parents, and schools (when applicable).

# STEP 3 Evaluate the Organization's Health and Stability

Evaluating an organization's health and stability will provide insight into its structure, capacity, and ability to carry out its mission. It is important to consider at least two factors:

- A. Financial Sustainability**, which describes an organization's ability to conduct its work in a fiscally responsible manner
- B. Management and Governance**, which describes the leadership and oversight of the organization

## A. Evaluate financial sustainability

The information below can be found on the organization's 990, an IRS form required of most nonprofits. It is best to review financial information over three to five years.

### FINANCIALLY SUSTAINABLE

- ✓ Organization's debt-to-equity ratio is less than 1.5, meaning its debt is manageable given its assets
- ✓ Organization's current ratio is equal to or greater than one, meaning its assets are greater than its short-term debt
- ✓ Organization maintains three to six months in cash reserves so it can withstand brief financial downturns
- ✓ Funding comes from a variety of sources, including government and philanthropy; physical activity programs often receive a large portion of funding from federal and state governments, through programs such as the Carol M. White Physical Education Program

### FINANCIALLY UNSUSTAINABLE

- ✗ Organization's debt-to-equity ratio is greater than 1.5; substantial amount of assets are directed to paying off debt
- ✗ Current ratio is less than one; the organization will continue to accumulate short-term debt as its assets are not enough to cover its debt
- ✗ Organization maintains fewer than three months in cash reserves, leaving it susceptible to economic shocks
- ✗ Funding is dominated by one source or type of funder; if the funding comes entirely from the government, programs may be very constrained because of the requirements that dictate measurement, supplies, and program content

## B. Evaluate management and governance

Management and governance indicators describe the capacity of staff and board teams to deliver on the mission, grow the organization, and hold themselves accountable.

### EFFECTIVE IMPLEMENTATION

- ✓ CEO has significant experience; management team has good working relationship; staff are actively involved in the field of physical activity, public health, and education, and have relationships with local school administration
- ✓ Board has at least seven members with diverse experience, including legal, management, financial, marketing, and fundraising, and experts on childhood obesity or physical activity; meets at least three times per year
- ✓ Planning shows evidence of measurable goals toward improving physical activity in the community and organizational improvement

### INEFFECTIVE IMPLEMENTATION

- ✗ Management team members lack relevant degrees or experience in the fields of physical activity, public health, and education, or may have limited leadership experience and are not involved in the community
- ✗ Board is comprised of individuals who lack diverse skills and experience; meetings are rare; members play little or no role in fundraising, oversight, or planning
- ✗ Planning occurs ad hoc; for example, in an annual meeting where possible changes are discussed informally



### Examples of EXCEPTIONAL IMPLEMENTATION

A 360-degree review is conducted annually on the CEO, including a review by the board

CEO is an active leader in the field

Three- to five-year plans are created with stakeholder input and tangible goals and milestones are explicitly laid out

Board includes community members, parents, and caregivers

## STEP 4 Evaluate the Organization's Ability to Create Systemic Impact

There are many ways in which an organization can influence the fields of physical activity and childhood obesity prevention. Activities include conducting impact and outcome research, providing consulting and training to other programs, and publicly advocating for policies that improve physical activity for children and their communities. SIR recommends considering three categories of activities:

- A. Growth plans**, which describe the organization's plans for the next three to five years
- B. Community partnerships**, which demonstrate the organization's ability to work collaboratively
- C. Field-building activities**, which show whether the organization is considering the big picture

### A. Evaluate growth plans

Evaluate growth plans to understand the organization's capacity to further its mission and reach more people

- Organization has a realistic growth plan with funding and measurable goals to increase the number of children served or expand services to include families
- Organization continually seeks to find new ways to connect participants, parents, and caregivers to community resources such as local athletic leagues and public parks

### B. Evaluate community partnerships

Evaluate community partnerships to understand the organization's ability to collaborate and drive greater change

- Organization involves a diverse set of community members and leaders in all stages of programming, to ensure all voices are heard
- Organization participates in community initiatives with other physical activity, nutrition, education, and government organizations to create a comprehensive and collaborative policy to address childhood obesity in the community

### C. Evaluate field-building activities

Evaluate field-building activities to understand the organization's role in driving systemic change

- Organization understands how to create change in the lives of participants, parents, and caregivers, and designs its programs accordingly
- Organization shares lessons learned with other practitioners and local institutions such as schools by making data and research publicly available
- Organization participates in coordinated advocacy opportunities with others working to address physical activity or prevent childhood obesity, such as collaborating with the mayor on a school physical education improvement campaign

## STEP 5 Interpret Your Evaluation and Determine How to Provide Support

The preceding four steps helped you gain a holistic understanding of an organization and its work to prevent childhood obesity through a focus on physical activity. To make a decision about the best way to provide support, determine where your organization fits among the following three categories:

- A. High-performing organizations** meet the majority of the criteria outlined above
- B. Developing organizations** meet some, but not all, of the criteria outlined above
- C. Low-performing organizations** meet few to none of the criteria outlined above

### A. High-performing organizations

These organizations focus on physical activity as a way to prevent childhood obesity. They are financially sound with excellent management and governance structures. They have realistic growth plans and are engaging in field-building activities to some degree, and are part of a holistic community initiative. You can feel confident that an investment in a high-performing organization will be effectively used.

Risk / Reward	Low risk / high reward
Recommended level of involvement	Low
Example investment opportunities	Continue running high-quality programs, explore including the wider community in programming, improve ability to track program impact on the community level, help bring the needs and voices of program participants to state-level policy debates, train participants to become community physical activity mentors

## B. Developing organizations

These organizations may be doing some things well but need improvement in other areas. Often these are young organizations, but they can also be established organizations that are undergoing a transition, or are not yet fully part of a holistic community initiative. Investment in developing organizations can be challenging yet exciting for donors and funders who are interested in helping them improve.

<b>Risk / Reward</b>	Moderate risk / high reward
<b>Recommended level of involvement</b>	Medium to High
<b>Example investment opportunities</b>	Refine core programs to improve the quality of the education, experience, or outreach components; fund expert input for curriculum and program development, and help organization deepen connections to initiatives in their community

## C. Low-performing organizations

These organizations have room for improvement in all areas, and are disconnected from holistic community initiatives. Investment in a low-performing organization that has a good management team that is dedicated to improving the organization and its programs can be exciting for a donor who wants to be deeply involved in helping an organization improve. Investment in a low-performing organization that is not dedicated to improvement is not recommended.

<b>Risk / Reward</b>	High risk / Reward varies based on organization's desire to improve
<b>Recommended level of involvement</b>	High — if the organization is strategically working to improve
<b>Example investment opportunities</b>	Support strategic or business planning, fund community needs assessments, fund research to determine ways to improve program, secure technical assistance from high-performing organizations, hire new staff with the expertise to significantly improve the program, help connect the organization with a strong community initiative

### ACKNOWLEDGEMENTS

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#### Active Living By Design

CHAPEL HILL, NC

#### Girls on the Run of Suffolk County

BOSTON, MA

#### Playworks

OAKLAND, CA

#### ShapeUp Somerville

SOMERVILLE, MA

### Supporting Emerging Social Innovations

#### HIGH RISK WITH THE POTENTIAL OF HIGH REWARD

Donors and funders may also wish to consider organizations that are testing innovative approaches that could eventually lead to breakthroughs in addressing targeted social issues. Such organizations should be able to articulate why they are diverging from the proven approach and how they see themselves improving upon that approach. It is becoming increasingly clear that obesity education programs must occur in conjunction with environmental and policy changes if children and their communities are to become healthier. Environmental changes include creating bike lanes and increasing access to healthy food, and policy changes include restoring physical education classes in schools. Innovative initiatives and partnerships are taking shape in communities across the country to address all the factors simultaneously. Engaging this issue provides one with the opportunity to think outside the box and engage with the environment, policies, and programs that shape how we live.

Social Impact Research (SIR) is the independent research department of Root Cause, a research and consulting firm dedicated to mobilizing the nonprofit, public, and business sectors to work together in a new social impact market. SIR aggregates, analyzes, and disseminates information to help donors and funders identify and support the most effective, efficient, and sustainable organizations working to solve social problems. Modeled after private sector equity research firms, SIR produces research reports, analyzes philanthropic portfolios, and provides educational services for advisors to help their clients make effective and rigorous philanthropic decisions.



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Root Cause, 11 Avenue de Lafayette Boston, MA 02111 PHONE: 617.492.2310 WEB: <http://rootcause.org/social-impact-research>