

**FORM #2:**  
**FINANCIAL, HUMAN & IN-KIND RESOURCES**

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Data Collector

Principal Investigator

1. Name of the Ministry and organizational unit (e.g., Branch) that provides/provided provincial matching funds:

Ministry: \_\_\_\_\_ Unit: \_\_\_\_\_  Not applicable

2. CONTRIBUTIONS FROM ORGANIZATIONS 

A ORGANIZATION	B TYPE	C HUMAN RESOURCES (hours/month)						D IN-KIND CONTRIBUTIONS (other than paid staff time)	E FUNCTIONS			F # OF YEARS	G ACTIVE
		YR1	YR2	YR3	YR4	YR5	YR6		Adm Acc Oth:	Coal Del TA R/E	TA R/E		
1.	Pub Priv Vol							MSP Trav Oth:	OSP Prom Mat	Adm Acc Oth:	Coal Del TA R/E		Y N
2.	Pub Priv Vol							MSP Trav Oth:	OSP Prom Mat	Adm Acc Oth:	Coal Del TA R/E		Y N
3.	Pub Priv Vol							MSP Trav Oth:	OSP Prom Mat	Adm Acc Oth:	Coal Del TA R/E		Y N
4.	Pub Priv Vol							MSP Trav Oth:	OSP Prom Mat	Adm Acc Oth:	Coal Del TA R/E		Y N
5.	Pub Priv Vol							MSP Trav Oth:	OSP Prom Mat	Adm Acc Oth:	Coal Del TA R/E		Y N
6.	Pub Priv Vol							MSP Trav Oth:	OSP Prom Mat	Adm Acc Oth:	Coal Del TA R/E		Y N
7.	Pub Priv Vol							MSP Trav Oth:	OSP Prom Mat	Adm Acc Oth:	Coal Del TA R/E		Y N

**FORM #2: Financial, Human and In-Kind Resources**

PROVINCE

**CONTRIBUTIONS FROM ORGANIZATIONS (CNTD.)**



A ORGANIZATION	B TYPE	C HUMAN RESOURCES (hours/month)						D IN-KIND CONTRIBUTIONS (other than paid staff time)	E FUNCTIONS			F # OF YEARS	G ACTIVE
		YR1	YR2	YR3	YR4	YR5	YR6		Adm Oth:	Coal Acc Del	TA R/E		
	Pub Priv Vol							MSp Oth: Trav OSP Prom Stor Mat	Adm Oth:	Coal Acc Del	TA R/E		Y N
	Pub Priv Vol							MSp Oth: Trav OSP Prom Stor Mat	Adm Oth:	Coal Acc Del	TA R/E		Y N
	Pub Priv Vol							MSp Oth: Trav OSP Prom Stor Mat	Adm Oth:	Coal Acc Del	TA R/E		Y N
	Pub Priv Vol							MSp Oth: Trav OSP Prom Stor Mat	Adm Oth:	Coal Acc Del	TA R/E		Y N
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	Pub Priv Vol							MSp Oth: Trav OSP Prom Stor Mat	Adm Oth:	Coal Acc Del	TA R/E		Y N
	Pub Priv Vol							MSp Oth: Trav OSP Prom Stor Mat	Adm Oth:	Coal Acc Del	TA R/E		Y N
	Pub Priv Vol							MSp Oth: Trav OSP Prom Stor Mat	Adm Oth:	Coal Acc Del	TA R/E		Y N

3. CASH CONTRIBUTIONS 

A SOURCE	B PROJECT YEARS	C PURPOSE	D TOTAL AMOUNT
1. Health Canada			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

4. CONTRIBUTIONS FROM VOLUNTEERS

A	B PROJECT YEARS					
	YR. 1	YR. 2	YR. 3	YR. 4	YR. 5	YR. 6
TOTAL NUMBER OF VOLUNTEERS						

5. INVENTORY OF STAFF & CONTRACT POSITIONS FUNDED BY FEDERAL & PROVINCIAL FUNDS



A POSITION TITLE	B TIME	C DATE POSITION STARTED		D DATE POSITION ENDED	
		Month	Year	Month	Year
1.	Full Part				
2.	Full Part				
3.	Full Part				
4.	Full Part				
5.	Full Part				
6.	Full Part				
7.	Full Part				
8.	Full Part				
9.	Full Part				
10.	Full Part				
11.	Full Part				
12.	Full Part				
13.	Full Part				
14.	Full Part				

6. INVENTORY OF PURCHASED PROFESSIONAL SERVICES 

A INDIVIDUAL/COMPANY	B MAIN PURPOSE	C DATE STARTED		D DATE ENDED	
		Month	Year	Month	Year
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					
16.					
17.					
18.					
19.					

7. INVENTORY OF PRINCIPAL AND CO-INVESTIGATORS

A NAME	B POSITION TITLE	C ORGANIZATION	D DAYS/ MONTH	E HIGHEST DEGREE	F DATE STARTED Month Year	G DATE ENDED Month Year
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						

**FORM #3:  
PROVINCIAL ORGANIZATIONAL STRUCTURE**

COMPLETED BY: \_\_\_\_\_

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REVIEWED BY:

\_\_\_\_\_ **Data Collector**

\_\_\_\_\_ **Principal Investigator**

1. Do/did you have a provincial coalition?

- YES ----> Go to Question 2
- NO ----> Go to Question 9

2. Date formed:

\_\_\_\_\_  
month year

Date dissolved:

\_\_\_\_\_  
month year

OR

Still in place

↓  
ANY PLANS TO DISSOLVE?

- YES ----> \_\_\_\_\_  
month year
- NO

3. Does/did your coalition have a lead agency?


- YES \_\_\_\_\_  
Name of organization
- NO

4. Do/did you have a written agreement among organizations?

- YES
- NO

5. How many coalition meetings (face-to-face or teleconference) were held each year during the demonstration phase?

Year 1	Year 2	Year 3	Year 4	Year 5	Year 6

6. What was the initial mandate of the coalition? 

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7. What were initial expectations for coalition members/terms and conditions for membership? 

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8. How did the coalition change over time? 

a) Composition:

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b) Role of Organizations:

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c) Functions:

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9. INVENTORY OF COMMITTEES/WORKING GROUPS FORMED DURING THE DEMONSTRATION PHASE 

A COMMITTEE/WORKING GROUP NAME	B PURPOSE/PRIMARY MANDATE	C DATE FORMED		D DATE DISSOLVED	
		Month	Year	Month	Year
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					

**FORM #4:  
CHRONOLOGY AND SELECTION  
OF COMMUNITIES**

COMPLETED BY: \_\_\_\_\_

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
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\_\_\_\_\_

Data Collector

\_\_\_\_\_

Principal Investigator

1. What were the goals and objectives of the provincial project? 

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2. Main activities in project years 

A PROJECT YEAR	B DESCRIPTION OF MAIN ACTIVITIES
1	
2	
3	
4	
5	
6	



5. How did you select demonstration communities/project sites?

Targeted recruitment of communities

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Request for proposal

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Was there a written agreement/contract with the communities?


YES  
 NO

7. Were financial contributions from communities required?

YES, for all or some communities  
 NO

If YES, what contributions were required?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. What were communities required to do in the following areas? 

a) Collection of data:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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b) Reporting on progress:

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c) Reporting on outcomes:

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d) Financial reporting:

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9. What were other aspects of the process to recruit communities not described above? 

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**FORM #5:  
INVENTORY OF MAJOR PROJECTS**

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_____	_____	_____	_____	_____

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Data Collector

\_\_\_\_\_  
Principal Investigator

Project #: \_\_\_\_\_

1. Name of Project: \_\_\_\_\_

2. Location:

Province-wide

Communities \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. Brief description:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. Goals and objectives:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. Target group:

General population       Children and Youth       Adults (15 years +)

Elderly persons       Women       Other (please specify)

\_\_\_\_\_

6. Risk factors:

Tobacco       Nutrition       Physical Activity       Diabetes

Obesity       Stress       Hypertension       Other (please specify)

\_\_\_\_\_

7. Channel:

Schools       Worksites       Health Care Settings

Community Agencies       Food Service Outlets       Media

Other (please specify): \_\_\_\_\_

Project #: \_\_\_\_\_

8. Strategy:	PRIMARY	SECONDARY
Public health leadership	<input type="checkbox"/>	<input type="checkbox"/>
Public education	<input type="checkbox"/>	<input type="checkbox"/>
Healthy public policy	<input type="checkbox"/>	<input type="checkbox"/>
Strengthening preventive health services	<input type="checkbox"/>	<input type="checkbox"/>
Community mobilization/development	<input type="checkbox"/>	<input type="checkbox"/>

9. Date active planning started: \_\_\_\_\_  
month year

10: Date implementation started: \_\_\_\_\_  
month year

11. Date implementation ended: **OR** Planned completion date: **OR** No plans to end  
\_\_\_\_\_   
month year month year

12. Lead organization: \_\_\_\_\_

13. Collaborating organizations:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

14. Estimate of total time for the project:  
\_\_\_\_\_ hrs./month **OR** \_\_\_\_\_ days/month for \_\_\_\_\_ months  
**OR**  
\_\_\_\_\_ years

15. Operating budget for the project: \$ \_\_\_\_\_ Total **OR** \$ \_\_\_\_\_/year

16. To what extent did the project meet its goals?  Goals were not met  
 Goals were partially met  
 Goals were fully met  
 Too early to judge

Project #: \_\_\_\_\_

17. What best describes your opinion of the success of this project?
- Would recommend to others with no revisions
  - Would recommend to others with minor revisions
  - Would recommend to others with major revisions
  - Would NOT recommend to others
  - Other (please specify): \_\_\_\_\_

18. Do you strongly agree, agree somewhat, or disagree that, at this point in time OR the last time this project was delivered:

	STRONGLY AGREE	AGREE SOMEWHAT	DISAGREE	DON'T KNOW
The staff enjoy/enjoyed working on this project				
The project helps/helped build partnerships				
Abandoning the project will have/had a negative effect on the provider				
The project has/had an impact on participants				
Many people participate/participated in the project				

19. Did/will the project end when funding for the demonstration phase ends?
- YES ---> Complete Question 20 only
  - NO ---> Complete Questions 21-25
  - DON'T KNOW

20. Why will the project end?
- Project is no longer appropriate (i.e., finite life and should not be prolonged artificially)
  - Project was not adopted by another organization
  - Other: \_\_\_\_\_  
\_\_\_\_\_

Project #: \_\_\_\_\_

1. Has a staff member within an organization been formally assigned to be in charge of the project?  YES ---> Name of organization: \_\_\_\_\_

NO  
 DON'T KNOW

22. In your opinion, how permanent is the project?  Very permanent  
 Somewhat permanent  
 Not at all permanent  
 Don't know

23. Is there a written or verbal "plan of action" for continuing this project?  Written  
 Verbal  
 No plan of action  
 Don't know

4. Have job descriptions been written for staff working on the project?  YES  
 NO  
 DON'T KNOW

25. Is there a clear written description of how to implement the project?  YES  
 NO  
 DON'T KNOW

**FORM #6:  
CHECKLIST OF PARTICIPATION IN SINGLE  
AND MULTIPLE RISK FACTOR ACTIVITIES**

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\_\_\_\_\_  
Principal Investigator

ROLE OF HHI: 0 = NO ROLE  
 1 = NO TIME OR MONEY, ENHANCED  
 2 = TIME OR MONEY, SUPPORT ROLE  
 3 = TIME OR MONEY, LEAD ROLE  
 4 = TIME OR MONEY, INDEPENDENT

SINGLE RISK FACTOR ACTIVITIES: TOBACCO		ROLE OF HHI (0-4)
<b>SCHOOLS</b>		
a.	Special events in schools (e.g., health fairs, National Nonsmoking Week activities, etc.) to encourage nonsmoking	
b.	School-based smoking prevention programs	
c.	School-based smoking cessation programs for teens	
d.	Recognition awards to schools with smoking prevention or cessation programming	
e.	Opportunities and incentives for staff and teachers to quit smoking	
<b>WORKPLACES</b>		
f.	Smoking education messages in the workplace	
g.	Smoking cessation initiatives for employees who smoke (e.g., Quit and Win, smoking cessation classes)	
h.	Workplace smoking policies	
i.	Municipal bylaw development to prohibit smoking in the workplace	
<b>HEALTH CARE SETTINGS</b>		
j.	Guidelines for primary care providers in smoking cessation counselling	
k.	Training for primary care providers in smoking cessation counselling	
l.	Information for primary care providers for referring patients to local resources available for smoking cessation	
<b>COMMUNITY AT LARGE</b>		
m.	Media campaigns to increase awareness of tobacco-related issues	
n.	National Nonsmoking Week activities directed to the community at large	
o.	Smoking cessation resources for special needs groups (e.g., women, pregnant women, heavy smokers, low income groups, etc.)	
p.	A campaign for retailers to inform them of laws prohibiting smoking in public places	
q.	Municipal bylaw development prohibiting smoking in public places	
r.	Provincial legislation for policies related to tobacco	
s.	Federal legislation for policies related to tobacco	

Please list on a separate page other major activities related to tobacco in which your province was involved during the demonstration phase of the Heart Health Initiative.

ROLE OF HHI: 0 = NO ROLE  
 1 = NO TIME OR MONEY, ENHANCED  
 2 = TIME OR MONEY, SUPPORT ROLE  
 3 = TIME OR MONEY, LEAD ROLE  
 4 = TIME OR MONEY, INDEPENDENT

SINGLE RISK FACTOR ACTIVITIES: HEALTHY EATING		ROLE OF HHI (0-4)
<b>SCHOOLS</b>		
a.	Healthy eating messages in schools/cafeterias	
b.	Curriculum review/development for healthy eating messages	
c.	School food policies	
<b>WORKPLACES</b>		
d.	Healthy eating messages in the workplaces/cafeterias	
e.	Contests/challenges related to healthy eating (e.g., weight loss contest)	
f.	Incentives for employees for adopting healthy eating patterns	
g.	Food policies in workplaces	
<b>HEALTH CARE SETTINGS</b>		
h.	Guidelines for primary care providers in dietary changes for CVD prevention	
i.	Patient educational materials on healthy eating	
j.	Training for primary care providers on dietary changes for CVD prevention	
k.	Information for primary care providers for referring patients to local resources available for healthy eating	
l.	Food policies in health care settings	
<b>RESTAURANTS</b>		
m.	On-site advertising of healthy food choices	
n.	Incentives/recognition for restaurants/cafeterias that provide healthy foods (e.g., dining guide, awards)	
o.	Training for food industry personnel on healthy cooking methods	
<b>GROCERY STORES</b>		
p.	Point of purchase information to encourage customers to buy healthy foods	
q.	Incentives to buy healthy foods (e.g., coupons, in-store specials)	
r.	Displays on healthy food choices	
s.	Grocery store tours on healthy food choices	
<b>COMMUNITY AT LARGE</b>		
t.	Media campaigns promoting healthy eating	
u.	Consumer education on food labels	
v.	Nutrition Month activities	
w.	Skills-based programs on healthy eating	
x.	Programs to increase access to healthy foods (e.g., food buying clubs, community gardens, community kitchens)	
y.	Provincial legislation for policies related to nutrition	
z.	Federal legislation for policies related to nutrition	

Please list on a separate page other major activities related to nutrition in which your province was involved during the demonstration phase of the Heart Health Initiative.

ROLE OF HHI: 0 = NO ROLE  
 1 = NO TIME OR MONEY, ENHANCED  
 2 = TIME OR MONEY, SUPPORT ROLE  
 3 = TIME OR MONEY, LEAD ROLE  
 4 = TIME OR MONEY, INDEPENDENT

SINGLE RISK FACTOR ACTIVITIES: PHYSICAL ACTIVITY		ROLE OF HHI (0-4)
<b>SCHOOLS</b>		
a.	Special events promoting physical activity	
b.	Curriculum review/development on health benefits of physical activity	
c.	Training or consultation for teachers on school programming to increase physical activity	
d.	Recognition to schools with daily physical education for students	
e.	School/board policies for quality daily physical education	
<b>WORKPLACES</b>		
f.	Physical activity messages in the workplace	
g.	Corporate challenges/contests to promote physical activity	
h.	Recognition awards to workplaces with physical activity initiatives	
i.	Workplace policies supporting physical activity (e.g., bicycle racks, showers, flexitime)	
<b>HEALTH CARE SETTINGS</b>		
j.	Patient education materials on physical activity	
k.	Training for primary care providers on patient counselling for physical activity/active living	
l.	Information for primary care providers for referring patients for referring patients to local resources available for physical activity	
<b>COMMUNITY AT LARGE</b>		
m.	Media campaigns promoting physical activity	
n.	FitWeek activities directed at the community at large	
o.	Promotions of community resources available for physical activity	
p.	Municipal bylaws for physical activity opportunities (e.g., safe walking and bicycle routes)	
q.	Provincial legislation for policies related to physical activity	
r.	Federal legislation for policies related to physical activity	

Please list on a separate page other major activities related to physical activity in which your province was involved during the demonstration phase of the Heart Health Initiative.

ROLE OF HHI: 0 = NO ROLE  
 1 = NO TIME OR MONEY, ENHANCED  
 2 = TIME OR MONEY, SUPPORT ROLE  
 3 = TIME OR MONEY, LEAD ROLE  
 4 = TIME OR MONEY, INDEPENDENT

MULTIPLE RISK FACTOR ACTIVITIES: TWO OR MORE RISK FACTORS		ROLE OF HHI (0-4)
<b>SCHOOLS</b>		
a.	Educational materials on heart health in schools	
b.	Recognition awards to schools with heart health programming (e.g., comprehensive school health approach)	
c.	Training or consultation for administrators and teachers on heart health in schools	
d.	Personal health risk assessments for staff or students	
<b>WORKPLACES</b>		
e.	Educational messages on heart health in workplaces	
f.	Health risk assessments for workers	
g.	Small group classes for behaviour change	
h.	Training or consultation for workplace professionals on heart health in workplaces	
<b>HEALTH CARE SETTINGS</b>		
i.	Patient education materials on heart health	
j.	Guidelines for primary care providers on assessing patient risk factors for CVD and counselling for CVD prevention	
k.	Training for primary care providers on assessing patient risk factors for CVD and counselling for CVD prevention	
l.	Information for primary care providers for referring heart patients to cardiac rehabilitation or other community programs	
<b>COMMUNITY AT LARGE</b>		
m.	Media campaigns on heart health	
n.	Special events promoting heart health	
o.	Information on community resources available for CPR training (which includes education on cardiovascular health)	
p.	Provincial legislation for policies related to heart health	
q.	Federal legislation for policies related to heart health	

Please list on a separate page other major activities related to multiple risk factors for CVD in which your province was involved during the demonstration phase of the Heart Health Initiative.

**FORM #7:  
INVENTORY OF PRODUCTS**

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\_\_\_\_\_ **Data Collector**

\_\_\_\_\_ **Principal Investigator**

Form 7 tables for Provincial data are included in the Word Perfect files available at this web address

**FORM #8:  
INVENTORY OF EVENTS**

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**REVIEWED BY:**

\_\_\_\_\_  
Data Collector

\_\_\_\_\_  
Principal Investigator

Form 8 tables for Provincial data are included in the Word Perfect files available at this web address