



Your Guide to Using the **School Health Index**



**U.S. Department of
Health and Human Services**
Centers for Disease
Control and Prevention

Suggested Citation

Centers for Disease Control and Prevention. *Your Guide to Using the School Health Index*. Atlanta: US Dept of Health and Human Services; 2019.

To Obtain Copies

Download in print on CDC's website: <http://www.cdc.gov/HealthySchools/SHI/>

Acknowledgments

The Centers for Disease Control and Prevention, Division of Population Health, CDC Healthy Schools, acknowledges the following individuals for their subject matter expertise and contribution to the *Your Guide to Using the School Health Index*:

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Your Guide to Using the
School Health Index

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Section 1: Your Guide to Using the School Health Index



The School Health Index: Self Assessment and Planning Guide (2017), is an online self-assessment and planning tool that schools can use to improve their health and safety policies and programs. This document, *Your Guide to Using the School Health Index (SHI)*, includes information and resources for district and school staff who are familiar with the SHI and who are charged with completing the assessment. Included in this Guide are information, materials, and resources on how to implement the SHI in schools, as well as a Facilitating Groups section for conducting trainings, workshops, or presentations on the SHI. Users can select the most appropriate sections of the guide and customize those components to best suit their needs. The Guide is intended to be used in conjunction with the School Health Index, which can be completed interactively online or printed from the CDC Healthy Schools website at <http://www.cdc.gov/HealthyYouth/SHI>.

You will find a SHI eLearning module <https://www.cdc.gov/healthyschools/professional-development/e-learning/shi.html> on the website that can be used with the SHI tool or in conjunction with this Guide to quickly understand the school health topics covered in the modules; steps for implementing the SHI; and the SHI process of conducting an assessment and developing an improvement plan. The video-based eLearning module will take approximately 1-1.5 hours to view. The module is self-paced, with several ways to access the training materials. You may select a specific chapter or chapter section or you may view the course in its entirety. For additional information, you can click on questions or resources in the "Go Further" section. You can also download the full eLearning module video transcript and "Go Further" sections to help with your understanding and presentations if needed. At the end of the course, you will have the opportunity to download a Certificate of Completion that can be used toward required professional development contact hours for your school or district.

The Whole School, Whole Community, Whole Child Model (WSCC)

The SHI contains 11 modules, structured around the Whole School, Whole Community, Whole Child model (<https://www.cdc.gov/healthyschools/wsc/index.htm>). The WSCC model is CDC's framework for addressing health in schools. WSCC contains 10 components, whereas the SHI contains 11 modules, with the additional module 1, focusing on cross-cutting school health and safety policies and environment. The model is student-centered and emphasizes the role of the community in supporting the school, the connections between health and academic achievement and the importance of evidence-based school policies and practices. The WSCC model meets the need for greater emphasis on both the psychosocial and physical environment as well as the increasing roles that community agencies and families play in improving childhood health behaviors and development. The WSCC model also addresses the need to engage students as active participants in their learning and health.



The 10 WSCC components are:

- Health Education
- Physical Education and Other Physical Activity Programs
- Nutrition Environment and Services
- School Health Services
- School Counseling, Psychological, and Social Services
- Social and Emotional Climate
- Physical Environment
- Employee Wellness and Health Promotion
- Family Engagement
- Community Involvement

Background

The School Health Index (SHI) was developed by CDC in partnership with school administrators and staff, school health experts, parents, and national nongovernmental health and education agencies. The SHI is easy to use and the results are completely confidential. It is written to be used by individual schools and can be adapted to meet the needs of schools and school districts. The SHI has two activities that are to be completed by teams from your school: a self-assessment process and a planning for improvement process.

- **The self-assessment process** involves members of your school community coming together to discuss what your school is already doing to promote good health and to identify your strengths and weaknesses. The SHI allows you to assess the extent to which your school implements the types of policies and practices recommended by CDC in its research-based guidelines for school health and safety policies and programs.
- **The planning for improvement process** enables you to identify recommended actions your school can take to improve its performance in areas that received low scores. It guides you through a simple process for prioritizing the various recommendations. This step will help you decide on a handful of actions to implement. Finally, you will complete a School Health Improvement Plan where you will list the steps you will take to implement your actions.

The SHI addresses seven health topic areas:

- Physical activity and physical education
- Nutrition
- Tobacco-use prevention
- Alcohol and other drug use prevention
- Chronic health conditions (e.g., asthma, food allergies)
- Unintentional injury and violence prevention (safety)
- Sexual health, including HIV, other STD and pregnancy prevention

Questions in the SHI focus on the above health topics and also include cross-cutting questions that address policies and practices that apply to all seven health topic areas. Completing the SHI is an important first step toward improving your school's health promotion policies and practices. Your school can then act to implement the School Health Improvement Plan and develop an ongoing process for monitoring progress and reviewing your recommendations for change. Your school's results from using the SHI can also help you include health promotion activities in your overall School Improvement Plan.

It is important to know what the SHI is and what it is not.



The SHI is a...

- Self-assessment and planning tool.
- Community-organizing and educational process.
- Focused, reasonable, and user-friendly experience.
- Process that identifies no-cost or low-cost changes.
- Process that provides justification for funding requests.



and not a...

- Research or evaluation tool.
- Tool for auditing or punishing school staff.
- Long, bureaucratic, painful process.
- Process that requires expensive changes.
- Process that identifies unfunded mandates.

Making The Case For The School Health Index: Why The SHI?

The SHI is a free tool designed to facilitate a team-driven approach to assessing and improving school health policies and practices. As a district or school health champion, it is vital to get buy-in from the top down. Equally important is understanding that the health of children and school staff helps to drive the overall performance of the school. Statistics indicate that children who engage in healthy behaviors also have better

academic grades¹. Health education, policies, and programs help teach and provide concepts and the framework to support healthy living and reduce illness. **It is imperative that district and school administrators and decision makers understand that school programs that account for the individual, family, school, and community can positively influence both student health behaviors and learning.** Evidence-based, effectively coordinated, and strategically planned school health programs and services are also necessary for closing the academic achievement gap. The SHI can enable schools to provide young people with the knowledge and skills they need to become healthy and productive adults. Improving students' health and safety can increase their capacity to learn; reduce absenteeism; and improve their physical fitness and mental alertness.

The SHI can enable schools to provide young people with the knowledge and skills they need to become healthy and productive adults.

Improving students' health and safety can increase their capacity to learn; reduce absenteeism; and, improve their physical fitness and mental alertness.

In order to see where you (the school/district) need to be in the future, you have to see where you are now. Assessment is the first step to identifying solutions and behaviors to reinforce strengths and improve weaknesses.

Why Should Your School/District Use the School Health Index?

There are many reasons that your school or district should use the SHI, and the bullets below are just a few examples...

- Enables schools to identify strengths and weaknesses of their health and safety policies and programs and to develop a School Health Improvement Plan.
- Engages teachers, parents, students, and the community in promoting health-enhancing behaviors and better health.
- Provides opportunities to improve the lives of young people by providing them the knowledge and skills needed to become productive and healthy adults. Healthy students perform better in school and have fewer absences.
- Offers a team approach to improving school health and safety policies and programs. It is a straightforward tool that gives administrators, staff, parents, and students an opportunity to work together to create a healthier school.

¹Rasberry CN, Tiu G, Kann L, McManus T, Michael SL, Merlo C, Lee SM, et al. Health-related behaviors and academic achievement among high school students—United States, 2015. *MMWR* 2017; 66(35): 921-9217

As a result of implementing the SHI, schools have made a wide variety of changes in their school health and safety policies and programs.



For example, schools have:

- Created a school health team.
- Moved healthier options to the front of the lunch line.
- Increased time for physical education.
- Started student and staff walking clubs.
- Added healthy choices to vending machines.
- Offered access to the gym outside of school hours.

Section highlights and takeaways...

1. **The SHI is a cost-free tool designed to facilitate a team-driven approach within seven content areas** (Physical activity and physical education, Nutrition, Tobacco-use prevention, Alcohol and other drug use prevention, Chronic health conditions, Unintentional injury and violence prevention, Sexual health, including HIV, other STD and pregnancy prevention).
2. **The School Health Index consists of two steps:**
 - **Conducting** a self-assessment, and
 - **Creating** a plan for improvement
3. You can conduct the assessment using the interactive online version or by downloading the print version. **The School Health Index identifies low-cost or no-cost improvements to a school environment.**
4. **A SHI eLearning module can be found on the website and can be used in conjunction with the tool.** The self-paced, video-based module will take approximately 1-1.5 hours to review.

Section 2: Using the School Health Index

Now that you have the background and overview of the School Health Index (SHI) from section 1, you're ready to use the SHI. This section introduces you to the two steps mentioned in section 1 and are listed below:

1. Conducting a self-assessment, and
2. Creating a plan for improvement

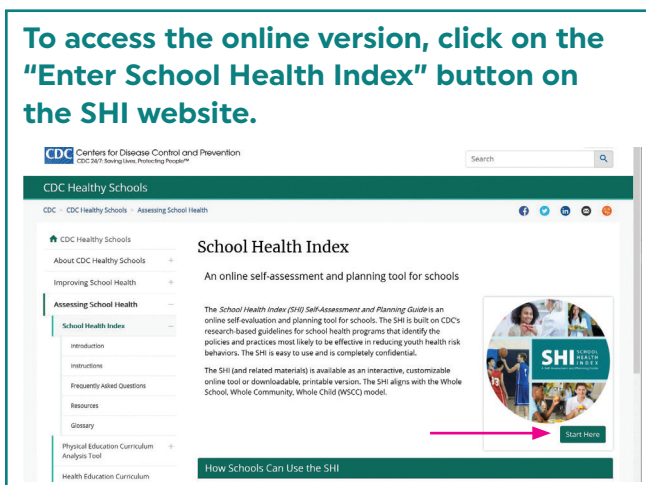
The **self-assessment step** leads your school community through the SHI modules in order to identify what your school is already doing to promote health as well as areas for improvement.

The **planning for improvement step** enables you to identify many actions your school can take to improve its performance in areas that received low scores. This step then involves prioritizing those actions to help you decide which actions to focus on first. Finally, you will complete a School Health Improvement Plan to list the steps you will take to implement each of the selected actions.

The SHI is not an evaluation or research tool. The results should not be used to audit or punish school staff. The SHI does provide steps and a process to create an Improvement Plan that can be used to monitor progress and review recommendations for change and identifies low-cost or no-cost improvements to a school environment. You will find that the self-assessment process is a focused, reasonable, and user-friendly experience.

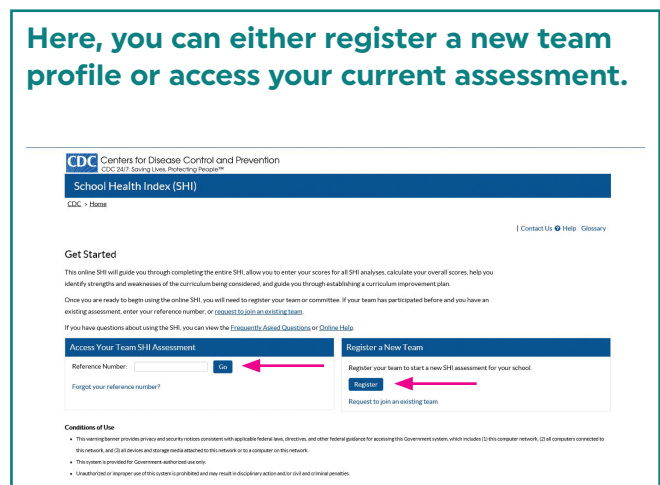
As you recall in section 1, you can conduct the assessment using the interactive online version or by downloading the print version.

To access the online version, click on the "Enter School Health Index" button on the SHI website.



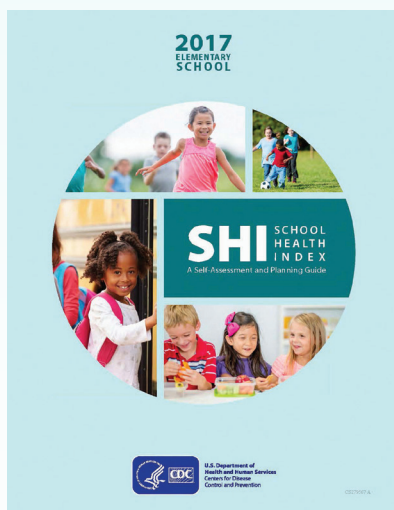
<https://www.cdc.gov/healthyschools/shi/index.htm>

Here, you can either register a new team profile or access your current assessment.



The online version of the School Health Index records your entries and generates score cards for specific topic areas. (It will be important to remember your login and to share with members of the SHI team who are completing the assessment).

Print versions for both the elementary and middle and high schools can be downloaded from the School Health Index website. The majority of the items in both versions are identical with only a few differences between them. Once you decide on the online or print format, select the version that is most appropriate for your school.



Questions in the Index are grouped and labeled by health topic area. Grouping questions allows your school to choose to address some, but not all, of the health topics if needed. Cross-cutting questions address issues that are relevant to all health topics.

Now you are ready for the recommended six steps for using the SHI:

Steps for Using the SHI :

1. Form a team

Your first step is to identify a team of people who will be responsible for completing the School Health Index. You may choose to create a new team or use an existing team, such as the School Health Advisory Council (SHAC) or Wellness team. The number of members on your team will vary, based on staffing, resources, and roles.

Key school representatives include:

- Students
- Administrators
- Health coordinators
- Health education teachers
- Physical education teachers
- Counselors
- Health service providers
- Nutrition service providers
- School site health promotion staff
- Other school staff (e.g., custodian; bus driver; media specialist; aides)

Key community representatives include:

- School board members
- Parents
- Faith community
- Business partners
- Voluntary health organizations
- Youth serving organizations
- Health care providers

- Mental health providers
- Local and county government
- Recreation
- Law enforcement
- Pre-school program staff
- Elderly
- Media
- After school staff



A group effort is very important to capture a diversity of opinions and experiences for meaningful assessment and successful planning and implementation.

The team should consist of a cross-section of school representatives and community members. Representation of as many segments of the community as possible can enrich the level of discussion and help with the acceptance of proposed activities. Parents, administrators, teachers, school staff, community members, and students will all contribute their experiences and expertise to the SHI process. Getting support from your school administrators greatly improves overall commitment to completing the SHI and implementing the School Health Improvement Plan. Include school and district-level administrators on the team so that they can facilitate implementation of the identified changes and support policy implementation. Another important thing to consider is identifying a coordinator to help lead the team's efforts at the school or district. This will vary from school to school. This person should be well organized; a champion for school health; and excited to help lead the charge! Some schools have found that it is best to have individuals from outside of the school facilitate the process – it's up to you! As you know, these individuals are removed from school politics and can be neutral in helping staff deal with internal conflicts.

Getting support from your school administrators greatly improves overall commitment to completing the SHI and implementing the School Health Improvement Plan.

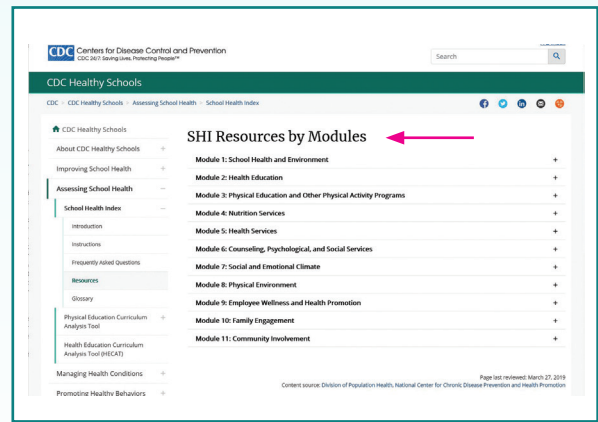
The SHI coordinator is responsible for keeping the team motivated and focused on its goals. Team members may have other priorities, so it is important for the coordinator to maintain the team's cohesiveness and encourage the team members to implement their proposed actions. A strong coordinator can be pivotal to the success of the School Health Index. To help with your decision on who should be selected as the SHI Coordinator for your school, **consider the functions listed below:**

Functions of the School Health Index coordinator include:

- Helping to gain administrative buy-in (see Section 1);
- Assisting the school in establishing a School Health Index team;
- Securing time to work on the School Health Index;
- Facilitating the team through the process;
- Following up with the implementation of the School Health Improvement Plan

2. Hold a meeting

During the first SHI team meeting, the SHI coordinator should explain the purpose and process of conducting the SHI assessment. There are a host of resources available on CDC's website that can be used to illustrate the process and purpose of the SHI (<https://www.cdc.gov/healthyschools/shi/resources.htm>). Consider using the School Health Index eLearning module to help with the purpose; understanding; and process for new team members, or for those that may need a refresher.



During this meeting, the team will also decide how the SHI should be implemented in their school or district. Some teams may decide to complete all modules together in one sitting and others will work in smaller teams to complete the modules. Typically, smaller groups are created for each of the modules based on the individual's interest, background, and expertise. Having at least two people in the small groups will allow for discussions about each question and may increase the efficiency of the process. The person most knowledgeable about the module topic can serve as that module's coordinator, e.g., physical education teacher will lead Module 3, Physical Education and Other Physical Activity Programs.

3. Complete modules and discussion questions

The SHI Coordinator will now have the team answer the discussion questions. As you may recall from Section 1, questions in the SHI are organized by modules that align with the components of the Whole School, Whole Community, Whole Child model. **Questions within each module are grouped and labeled by a health topic area: physical activity (PA), nutrition (N), tobacco (T), alcohol and other drugs (AOD), chronic health conditions (CHC), safety (S), sexual health (SH), and cross-cutting (CC).** Cross-cutting questions address issues that are relevant to all health topics. Remember, some questions are labeled for more than one health topic (e.g., PA/S) because they are relevant to more than one (e.g., both physical activity and safety).

Grouping questions allows schools to choose to address some, but not all, of the health topics covered by the SHI. CDC believes that a comprehensive approach to school health, that addresses all health topics, is the most effective way to influence students' health behaviors. However, we recognize that some schools will want to address only one topic or just a few at a time.

The team will read through the questions carefully and select the answer that best describes their school. Words and phrases that are underlined and bolded are further defined in the SHI Glossary. Clicking on these words in the online version will take you directly to this additional information.

SCHOOL HEALTH INDEX – ELEMENTARY SCHOOL

CC.6 Local school wellness policy

Has your school **implemented** the following components of the local education agency's (LEA) or district's local school wellness policy?

- Specific goals for nutrition education and promotion activities
- Specific goals for physical activity opportunities
- Specific goals for other school-based activities that promote student wellness
- Nutrition standards for all foods and beverages sold on the school campus during the school day that are consistent with Federal regulations for school meals and Smart Snacks in School
- Standards for all foods and beverages provided, but not sold, to students during the school day (e.g., in classroom parties or classroom snacks brought by parents)
- Policies for marketing and advertising of only those foods and beverages that meet the USDA Smart Snacks in School nutrition standards on the **school campus** during the school day.

↑

If the entire SHI team is completing the self-assessment modules together, all team members will work on the 11 modules by answering a series of questions and developing a set of recommendations. If the SHI team has broken up into smaller groups, each of the groups will meet and complete the series of questions and recommendations for their assigned module.

Item Scoring:

The School Health Index uses a 4-point scale, assigning 3, 2, 1, or 0 points to each question. For each question, a score of 3 points means that your school has the policy or practice fully in place and is achieving the "gold standard." A score of 2 points means that your school is doing very well but falls somewhat short of the gold standard. A score of 1 point means that your school is doing something in this area, but there is room for improvement. Finally, 0 points indicates that your school is doing very little or nothing to meet the gold standard. Later, these scores are used to identify strengths and weaknesses.

If a question does not apply to your school, you can designate it as "not applicable." If you are not sure or need more information before you can answer the question, you can skip it and return to it at another time. You do not have to answer all the questions in a module if they do not apply.

The team will circle or input all of the discussion question answers into the Module Score Card and calculate each module score.

How to determine the module score:

- Add the scores for each column.
- Add the four sums together across the bottom.
- Divide the total number of points by the maximum number of points for the module.

Sample Completed Score Card
Module 1: School Health and Safety Policies and Environment

Instructions

- Carefully read and discuss the Module 1 Discussion Questions (pages 5-34), which contains questions and scoring descriptions for each item listed on this Score Card.
- Circle the most appropriate score for each item.
- After all questions have been scored, calculate the overall Module Score and complete the Module 1 Planning Questions located at the end of this module (pages 36-37).

		Fully in Place	Partially in Place	Under Development	Not in Place
CC.1	Representative school health committee or team	3	2	1	0
CC.2	Written school health and safety policies	3	2	1	0
CC.3	Communicate health and safety policies to students, parents, staff members, and visitors	3	2	1	0
CC.4	Overcome barriers to learning	3	2	1	0
CC.5	Enrichment experiences	3	2	1	0
CC.6	Local school wellness policy	3	2	1	0
CC.7	Standard precautions policy	3	2	1	0
CC.8	Written crisis preparedness and response plan	3	2	1	0
PA.1	Maintain safe play environment	3	2	1	0
PA.2	Recess	3	2	1	0
PA.3	Playgrounds meet safety standards	3	2	1	0
PA.4	Access to physical activity facilities outside school hours	3	2	1	0
PA.5	Prohibit using physical activity as punishment	3	2	1	0
PA.6	Prohibit withholding recess as punishment	3	3	1	0
N.1	Prohibit using food as reward or punishment	3	2	1	0
N.2	Access to free drinking water throughout the school day	3	2	1	0
N.3	All foods sold during the school day meet the USDA's Smart Snacks in School nutrition standards	3	2	1	0
N.4	All beverages sold during the school day meet the USDA's Smart Snacks in School nutrition	3	2	1	0
N.5	All foods and beverages served and offered during the school day meet USDA's Smart Snacks in School nutrition standards	3	2	1	0
N.6	All foods and beverages sold during the extended school day meet USDA's Smart Snacks in School nutrition standards	3	2	1	0
COLUMN TOTALS: For each column, add up the numbers that are circled and enter the sum in this row.		18	12	7	0
(If you decide to skip any of the topic areas, make sure you adjust the denominator for the Module Score (60) by subtracting 3 for each question eliminated).		TOTAL POINTS: Add the four sums above and enter the total to the right.			37
NOTE! For simplicity, this example shows only Cross-Cutting, Physical Activity, and Nutrition Items. The denominator has been adjusted accordingly.		MODULE SCORE = (Total Points / 60) X 100			62%

1. Review Results

Now you are ready to review the results! Meet again with the team to examine the score cards for each module and discuss the identified strengths and weaknesses. It's important to keep the momentum going, so do your best to meet on a regular basis - ideally meeting daily or a minimum of once a week to determine how to move forward. Discuss the recommended actions for each module, then have all participants work together to identify the top priority actions for the entire school.

2. Create an Action Plan Complete the School Health Improvement Plan. This involves setting 3 to 5 priority actions; discussing the resources needed; discussing the action steps for each priority; assigning responsibilities; setting timelines for the actions; and deciding how to present the plan to the school leadership and community.

SCHOOL HEALTH INDEX – ELEMENTARY SCHOOL

Sample School Health Improvement Plan

Instructions

1. In the first column: list, in priority order, the **actions** that the School Health Index team has agreed to implement.
2. In the second column: list the specific **steps** that need to be taken to implement each action.
3. In the third column: list the people **who** will be responsible for each step and **when** the work will be completed.

Actions	Steps	By Whom and When
1. Establish a set of competitive food offerings that align with strong nutrition standards.	a. Contact other schools and experts to identify different models.	Sally H. 10/2
	b. Conduct taste tests for healthy alternatives that students like.	Mildred P. 10/23
	c. Meet with principal to get support.	Sally H. 10/25
	d. Develop draft competitive food offerings.	Henry T. 11/3
	e. Get feedback from teachers, parents, students, administrators, and community members.	Sally H. 11/15
	f. Develop slide show about new choices to staff, students, parents, and district.	Mildred P. 11/26
	g. Schedule and deliver presentations to staff, students, and parents.	Henry T. 12/2

3. Re-Evaluate

Your task is not over! It's imperative to continually re-evaluate. Discuss how you will monitor progress and when the team will meet again. Consider using the SHI resources mentioned previously to help plan this second meeting. A list of resources is available online at <https://www.cdc.gov/healthyschools/shi/resources.htm>



Consensus Building:

As we wrap up Section 2, it's important to mention Consensus! It's vital to build consensus among SHI team members on key issues. Consensus is finding an acceptable proposal that all members can support. It is not a unanimous vote, a majority vote, or that everyone is 100% satisfied. It requires time, active participation by all, good listening and communication skills by all, open-mindedness, and creative thinking. If your team is struggling to come to a consensus, consider the Two-Step Process that can be found in appendix E.

Section highlights and takeaways...

1. **Questions in the SHI are organized by modules** (that align with the components of the Whole School, Whole Community, Whole Child model). **Questions within each module are grouped and labeled by one or more health topic areas:** physical activity (PA), nutrition (N), tobacco (T), alcohol and other drugs (AOD), chronic health conditions (CHC), safety (S), sexual health (SH), and cross-cutting (CC). Cross-cutting questions address issues that are relevant to all health topics. **Some questions are labeled for more than one health topic** (e.g., PA/S) because they are relevant to more than one (e.g., both physical activity and safety).
2. Grouping questions allows schools to choose to address some, but not all, of the health topics covered by the SHI. **CDC believes that a comprehensive approach to school health, that addresses all health topics, is the most effective way to influence students' health behaviors. Steps for Implementation:**
 - Form a team
 - Hold a meeting
 - Complete modules and planning questions
 - Review results
 - Create an action plan
 - Re-evaluate
3. **Getting support from school administrators greatly improves overall commitment to completing the School Health Index and implementing the School Health Improvement Plan.**
4. **It is very important to have at least two people work on each module because it will help increase accuracy and diversity of creative insights for improving school health policies and programs.** Each team member should be assigned to a module based on his or her area of interest and expertise.

Section 3: Planning for Improvement

It's time to take action! First, make sure that all modules have been scored. Then, the School Health Index (SHI) Coordinator should schedule a meeting with the entire team to discuss the findings, next steps, and start the Planning for Improvement process.

Among the hundreds of individual actions you can take to help develop healthy children who come to school ready and able to learn, you've already completed the most important one – assessing your school's strengths and weaknesses. No matter how your school scores on the SHI, you now have the information you need to start planning for a healthier school.

Taking Action, One Step at a Time

You are now ready to take action and put the plans into motion! This section, Planning for Improvement, contains two forms – the overall score card and the School Health Improvement Plan.

Overall Score Card

Overall Scorecard Export Overall Scorecard

For each module, a "✓" appears where the module score falls. Use these scores to create a Plan for Improvement.

Modules	Low		Medium		High
	0-20%	21-40%	41-60%	61-80%	81-100%
Module 1 - School Health and Safety Policies and Environment					
Module 2 - Health Education					
Module 3 - Physical Education and Physical Activity Programs					
Module 4 - Nutrition Environment and Services					
Module 5 - School Health Services					
Module 6 - School Counseling, Psychological, and Social Services					
Module 7 - Social and Emotional Climate					
Module 8 - Physical Environment					
Module 9 - Employee Wellness and Health Promotion					
Module 10 - Family Engagement					
Module 11 - Community Involvement					

School Health Improvement Plan

SCHOOL HEALTH INDEX - ELEMENTARY SCHOOL

Sample School Health Improvement Plan

Instructions

- In the first column: list, in priority order, the **actions** that the School Health Index team has agreed to implement.
- In the second column: list the specific **steps** that need to be taken to implement each action.
- In the third column: list the people **who** will be responsible for each step and **when** the work will be completed.

Actions	Steps	By Whom and When

Both forms will help you and the committee make the best use of the information collected by each module team.

The four action steps described in this section can help you plan improvements and implement recommended changes.

Step 1: Complete the Overall Score Card

Step 2: Complete the School Health Improvement Plan

Step 3: Implement recommendations

Step 4: Reassess annually and strive for continuous improvement

The example score card below represents Module 1 – School Health Safety Policies and Environment. The score card reports the overall module score was 62%. The scores calculated by each group are recorded in the overall score card in this example.

Planning Step 1: Look back at the scores you assigned to each question. According to these scores, ask yourself, "what are the strengths and weaknesses of your school's policies and environment related to health and safety"?

Planning Step 2: Then for each of the weaknesses identified, list several recommended actions to improve the school's scores (e.g., create and maintain a school health committee).

Planning Step 3: You will now rate each proposed action from one to five in terms of the five dimensions listed below. This enables actions to be prioritized for implementation.

Sample Completed Score Card
Module 1: School Health and Safety Policies and Environment

Instructions

- Carefully read and discuss the Module 1 Discussion Questions (pages 5-34), which contains questions and scoring descriptions for each item listed on this Score Card.
- Circle the most appropriate score for each item.
- After all questions have been scored, calculate the overall Module Score and complete the Module 1 Planning Questions located at the end of this module (pages 36-37).

	Fully in Place	Partially in Place	Under Development	Not in Place
CC.1	3	2	1	0
CC.2	3	2	1	0
CC.3	3	2	1	0
CC.4	3	2	1	0
CC.5	3	2	1	0
CC.6	3	2	1	0
CC.7	3	2	1	0
CC.8	3	2	1	0
PA.1	3	2	1	0
PA.2	3	2	1	0
PA.3	3	2	1	0
PA.4	3	2	1	0
PA.5	3	2	1	0
PA.6	3	3	1	0
N.1	3	2	1	0
N.2	3	2	1	0
N.3	3	2	1	0
N.4	3	2	1	0
N.5	3	2	1	0
N.6	3	2	1	0
COLUMN TOTALS: For each column, add up the numbers that are circled and enter the sum in this row.	18	12	7	0
(If you decide to skip any of the topic areas, make sure you adjust the denominator for the Module Score (60) by subtracting 3 for each question eliminated).	TOTAL POINTS: Add the four sums above and enter the total to the right.			37
NOTE! For simplicity, this example shows only Cross-Cutting, Physical Activity, and Nutrition Items. The denominator has been adjusted accordingly.	MODULE SCORE = (Total Points / 60) X 100			62%

Below are the **five dimensions** and the questions that the SHI Coordinator should pose to the team (and all team members should keep these questions in mind throughout the planning process!):

- Importance** – How important is the action to my school?
- Cost** – How expensive would it be to plan and implement the action?
- Time** – How much time and effort would it take to implement the action?
- Commitment** – How enthusiastic would the school community be about implementing the action?
- Feasibility** – How difficult would it be to complete the action?

Here is a completed sample of planning questions for Module 1.

You can use this as a reference.

SCHOOL HEALTH INDEX – ELEMENTARY SCHOOL

Sample Completed Planning Questions
Module 1: School Health and Safety Policies and Environment

The Module 1 Planning Questions will help your school use its School Health Index results to identify and prioritize changes that will improve policies and programs to improve students' health and safety.

Planning Question 1
Look back at the scores you assigned to each question. According to these scores, what are the **strengths** and the **weaknesses** of your school's policies and environment related to students' health and safety?

<p>Strengths</p> <ul style="list-style-type: none">• Excellent communication of policies with parents, visitors, and staff.• Offer a wide variety of enrichment experiences.• Students are actively supervised.• Have a strong standard precautions policy.• Do not use physical activity as punishment.• Free drinking water is widely available and students can bring bottles to class.• Students are given enough time to wash their hands before eating.	<p>Weaknesses</p> <ul style="list-style-type: none">• Do not have a committee to oversee our health programs (CC.1).• Local wellness policy has not been implemented at the school level (CC.6).• Could make more enrichment experiences available to students (CC.5)• Recess is not provided every day (PA.2).• Some teachers still use candy as rewards (N.1).• Some food available during the school day does not meet school nutrition standards (N.4).
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Planning Question 2
For each of the weaknesses identified above, list several recommended actions to improve the school's scores (e.g., create and maintain a school health committee).

1. Form a school health committee.
2. Have the school health committee review the district local wellness policy.
3. Conduct staff development or hire new staff to provide enrichment experiences for students.
4. Make sure all teachers are providing daily, 20 minute recess.
5. Give teachers ideas about non-food rewards.
6. Work with the nutrition services staff to make sure all foods meet school nutrition standards.

SHI Coordinator Reminders for the Team:

- It's imperative to answer all questions as accurately as possible. This is a self-help tool, not an instrument for punishing staff.
- There is no passing grade. This is designed to help you understand your school, not to compare your school with other schools.
- Expect to get some low scores. Low scores can help you build awareness of areas needing improvement.

You will find a sample School Health Improvement Plan below.

SCHOOL HEALTH INDEX – ELEMENTARY SCHOOL

Sample School Health Improvement Plan

Instructions

1. In the first column: list, in priority order, the **actions** that the School Health Index team has agreed to implement.
2. In the second column: list the specific **steps** that need to be taken to implement each action.
3. In the third column: list the people **who** will be responsible for each step and **when** the work will be completed.

Actions	Steps	By Whom and When
1. Establish a set of competitive food offerings that align with strong nutrition standards.	a. Contact other schools and experts to identify different models.	Sally H. 10/2
	b. Conduct taste tests for healthy alternatives that students like.	Mildred P. 10/23
	c. Meet with principal to get support.	Sally H. 10/25
	d. Develop draft competitive food offerings.	Henry T. 11/3
	e. Get feedback from teachers, parents, students, administrators, and community members.	Sally H. 11/15
	f. Develop slide show about new choices to staff, students, parents, and district.	Mildred P. 11/26
	g. Schedule and deliver presentations to staff, students, and parents.	Henry T. 12/2

After the School Health Improvement Plan has been developed, the next steps are to secure approval to move forward with the recommendations, implement the recommendations, and monitor progress. The sample school health improvement plan above shows the essential elements of a well-designed plan, and includes actions; steps; and by whom and when.

It's essential to check progress on your plan annually. Take the time to measure and recognize progress and accomplishments of the previous school year. It's imperative to report annually to the principal, superintendent, and school board on progress made during the previous year and your plans for the upcoming year. Remember, success breeds success! Celebrate your success!

As you can now tell, the School Health Index is a straightforward tool that gives administrators, staff, parents, and students a chance to get involved and work together to create a healthier school environment and student population. Schools across the country have already made dramatic improvements based on the SHI and the Improvement Plan that teams developed together.



A small investment of time can pay big dividends in improving students' well-being, readiness to learn, and prospects for a healthier life.

Section highlights and takeaways...

1. **The SHI team member groups will prioritize their actions in the five dimensions below and will ask the following questions:**
 - a. **Importance** – How important is the action to my school?
 - b. **Cost** – How expensive would it be to plan and implement the action?
 - c. **Time** – How much time and effort would it take to implement the action?
 - d. **Commitment** – How enthusiastic would the school community be about implementing the action?
 - e. **Feasibility** – How difficult would it be to complete the action?
2. **When completing the scorecard, remember:**
 - a. **Answer questions as accurately as possible.**
 - b. **There is no passing grade since the SHI is designed to help you understand your school, not to compare your school with other schools.**
 - c. **Low scores can help you build awareness of areas needing improvement.**
3. **Check progress on your plan annually. Report annually to the principal, superintendent, and school board on progress made during the previous year and plans for the upcoming year.**
4. **Keys to Success:**
 - Involve a school health champion (strong leadership)
 - Get administrative buy-in
 - Include a broad school team with representation from all sectors, including family and community
 - The process must be organized and well-facilitated (many schools are using outside facilitators)
 - Start with small, achievable goals
 - Highlight and build on successes

The full SHI, developed by CDC, is available in downloadable/hard copy pdf and online at: <https://www.cdc.gov/healthyschools/shi/index.htm>

Section 4: Facilitating Groups

Introduction

Are you thinking about or planning on providing a presentation or workshop for your school or district? This section is for trainers and training staff who are in charge of leading the effort in delivering the *CDC School Health Index: Self Assessment and Planning Guide* (SHI) to schools and school districts throughout their state. This section will take you through considerations for planning and implementing a SHI workshop, and provide professional development and follow-up strategies for working with your group. Although the content mainly focuses on providing instructions for implementing an effective workshop (an educational program for a small group of people that focuses on techniques and skills in a particular field that has long-term benefits), the information can be adapted for any type of presentation, informational session, or meeting that you may provide to further schools' and districts' understanding of the SHI. This guide references additional tools and materials to reinforce key concepts and connects all of the SHI resources available into a one-stop, easy-reference source. This information will prepare you to successfully engage audiences to use the SHI to improve school health.

There are several things to keep in mind when considering facilitating a SHI workshop. Typically, 30-35 attendees per trainer is the most effective and manageable. The same is true when managing the various skills and resources required to implement all phases of a SHI workshop. This section describes the roles and responsibilities required to support a SHI workshop.

The Trainer

A trainer, someone who is skilled in teaching content, can take on multiple roles: promoter, manager, facilitator, and coach (someone who encourages a mentee and supports their knowledge and growth through skill development). These roles interconnect and change, based on the particular phase, tasks, available resources, composition of the overall team, and participant needs.

- **Promoter**
This role is important when no SHI presentations or workshops have been scheduled or conducted. Your goal is to generate interest in the SHI, especially if you are considering facilitating a workshop.
- **Manager**
The manager's primary role is to manage the SHI workshop tasks and team. The manager's goal is to gain support and resources to conduct a successful SHI workshop.
- **Facilitator**
In the implementation phase, the manager's role takes a back seat and facilitation becomes the primary task. Facilitator roles and responsibilities will vary from state to state and from school district to school district. The facilitator's task is to facilitate training and education by effectively communicating how to use the tool and applying the SHI concepts to participant needs by integrating case studies and sharing helpful practices.
- **Coach**
Coaching becomes the primary role in the evaluation and follow-up phase. Although you may temporarily wear your facilitator or manager hat during this phase, it is the coach who activates the team. He or she outlines the play (the goals), which is to help the players get in the game and experience a successful win!

In each role, you as the trainer are the primary lead pulling together the resources to create a SHI presentation or workshop that is relevant to your audience's needs.

The Planning and Implementation Team

A SHI trainer should be prepared to work with a SHI planning and implementation team. When a team works well together, success feels easy to achieve. **You, as the SHI trainer, are responsible for building and leading a cohesive team with distinct roles and responsibilities to successfully implement a SHI presentation or workshop.**

Trainers typically work with a team that includes the following individuals:

- **Workshop Coordinator**
The workshop coordinator is familiar with the schools and participants and will assist you in preparing for and supporting the SHI workshop. Oftentimes, a workshop coordinator is also the facilities coordinator (see below).
- **SHI Coordinator**
The SHI coordinator is the school representative who organizes the local SHI team that will be completing the SHI tool. **The SHI coordinator helps obtain approval for the team's time to work on the SHI, assists the team in using the SHI, follows up with the implementation of the SHI action plan, and provides support and resources.** Specific tasks may vary, depending on the school or district. In short, the SHI coordinator is the primary planner for your school or district's SHI implementation team.
- **Facility Coordinator**
The facility coordinator is your point of contact for the facility in which the workshop will be held. This person is familiar with the facility and can help with room logistics (e.g., set up; regulate temperature, etc.), operate instructional equipment, distribute materials, and troubleshoot facility issues, as needed. Frequently, the facility coordinator and the workshop coordinator are dual roles.

Whether you are a new or veteran manager in a new team environment, the following concepts can help you build an effective, cohesive team.

- **Identify the purpose:** Your team needs to know why the goal is important, and they should feel confident about the direction you are going.
- **Set the scope and boundaries:** The scope informs the team of the "how" about working together and accomplishing the goal. You should be honest about the potential risks of a chosen path and communicate not only the direction but also the information the team needs to know to carry out their responsibilities.
- **Define your role:** Great team members may not blindly follow. They may need to know who you are and how you see yourself as a leader. People follow leaders who are trustworthy and accountable. Be the person others want to follow.
- **Be a facilitative supporter:** Your team will need support to acquire needed resources and create innovative solutions. They need to feel empowered to pursue their ideas. Think about how you will engage the team in feeling supported.
- **Seek and incorporate feedback:** As the leader, you have a vision for how the workshop will transpire. Share that vision with your team members. Remember, your team members are leaders with ideas and thoughts too. People will value tasks and results that reflect their contributions.
- **Appreciate contributions:** The team members are likely volunteering their time and expertise. Value their contributions by showing honest, sincere appreciation. Determine how the team likes to be recognized and consider how you can integrate positive recognition in successes and challenges.

The workshop planning and implementation team is one of two teams you are leading. You will engage your second team – the workshop participants – during the implementation, evaluation, and follow-up phases of the SHI workshop.

Pre-Workshop Preparation

Now that you understand the SHI's impact on school health and understand the roles and responsibilities needed to implement all phases of the SHI workshop, it is time to put on both the promoter and workshop planner hats. Some agencies or schools may not know about the SHI or about the training that is available to their schools or districts. Before you can conduct a SHI workshop, there has to be a demand for one. How do you create demand? Develop and implement a promotion plan. **Promotion does not have to be a lavish, costly venture, but it is critically important.** Let's start with preparation and planning.

Preparation and Planning

Planning an effective SHI workshop requires several components. Each component must be well thought out and implemented in the correct order. In Phase 1, you reviewed your current situation and determined how you would proceed. You are now ready to begin Phase 2 – **Workshop Planning** (section below) – where you will review your materials and plan your actions to implement the workshop or information session. The process is the same whether you have a small or large group. In the section below, we will review the preparation and planning process to ensure the training or session you implement is organized, meets your goals, and is conducted in a helpful, engaging manner.

Creating a Promotion Plan

Let's start with creating a promotion plan. A promotion plan, or strategy, is an outline of how you are going to promote your workshop. Your promotional plan should address the following questions.

- **Who is your target audience?**

When you think back to your school experiences, who are the first people you think of? Maybe it is the teacher who influenced your life in some way, or perhaps it is the principal who roamed the halls and everyone either loved or avoided. There are numerous roles in the schools — from administration to school affiliates, such as educational associations and partners. Decide on your target audience.

- **Who has access to or the best relationships with your target audience?**

Individuals with established connections with your primary audience will probably be your best partners. These individuals can position you to establish your own relationships if they cannot be directly involved in promoting.

- **How are you going to establish relationships?**

In the previous paragraph, you identified essential connections. Now, think about establishing relationships in the context of the best ways to communicate and the time and actions you're willing to take to cultivate those relationships. Try starting where the target audience spends most of their time. Think about ways to connect in places they commonly frequent.

- **What is happening in the school environment?**

Schools have many competing priorities, from budget constraints, academic standards, and ratings, to new initiatives and requirements. It is important to get a pulse on the school's current activities. Get to know what is happening in the school environment so that you can align your goals with their priorities. Access the school website and talk to your inside connections—associates, teachers, and parents you already know. Visit the school and pay attention to signs, pamphlets, and posters.

- **How do people know the tool and workshops exist?**

Your promotional plan should include a strategy that will inform school staff and community partners about the SHI and its benefits. There are several ways you can accomplish this goal.

- Identify the best communication sources
- Develop communication strategies
- Print flyers to place in the teacher's lounge (see sample flyer in Trainer Resources)
- Attend a school gathering (PTA meeting, school fair)

- Volunteer at an event or meeting
- Talk with the school board members, principal, health educators, or staff
- Send an informational e-mail to the district or school coordinators

As you determine the right channel for sharing your promotional message with the schools, remember your message should be based on the audience's priorities and needs. If the school is focused on end-of-grade testing, your SHI messages should emphasize academics and testing. For example, "A healthy, well-nourished child does better on tests. Does your school have healthy choices that help children's attention spans, retain information, and concentrate during testing?"

- **What resources do you need?**

The types of resources needed are influenced by your promotional strategy and audience needs. Remember, you are part of a team. Your individual resource capacity has just expanded because your team may have ideas and resources to consider as well. If you have reached out to individuals who have pre-established relationships with your audience, they may also have resources and be willing to share them.

- **Who needs to be involved?**

You may determine that establishing interest is best handled by a few key people, or you may choose to involve the entire team. Remember, team members may have their own connections and resources. Decide which are most effective, map out supporting actions, and delegate as appropriate. Be clear about what you want. Clear directions will help avoid confusion.

Workshop Planning

You have created interest within your school and/or districts, and now you are receiving requests for information to host or attend a SHI workshop or information session. It is time to kick planning into high gear. Planning a workshop takes a great deal of focus, organization, and flexibility. If your workshop is well planned, it will create a valuable experience for everyone. Satisfied participants will join your promotional strategy by spreading the word.

You may have one request to host a workshop for several schools in one district. On the other hand, you may have two or three staff members from several schools who want to attend a workshop. One contact for several schools makes the initial planning process less complicated. Ask for one person to serve as the liaison for the interested staff members in that school. That person will be your "go-to" person for specifics you'll need to include in your planning process.

Example

The school prefers to access the Internet rather than receive hard copies of information.

Key Resource: An Internet presence

Ideas:

- Ask to be a featured tool on the school's website.
- Request permission to add a video, article, or an attention-grabbing message to the school's website.
- Refer to CDC Healthy Schools A Guide to Promoting Professional Development for additional tips. (https://www.cdc.gov/healthyschools/tths/17_279948-A-MPDS-Guide_WEB-508.pdf)

As you talk to the host or liaison, ask for information that will identify the school's specific needs and expectations. **Start by performing the following steps:**

- **Define the Goals**

What does the school or district want to receive from the workshop? Are there specific standards they must adhere to or achieve? Do they need to improve an existing policy or practice? Is a policy or practice in place? Without a clear understanding, you will not be able to integrate important measures into your training plan.

- **Identify Who Will Attend**

Knowing who will attend impacts your goals and objectives for the workshop and provides a peek into the audience's expectations. For example, if you have an audience that is predominately administrative, determine how that would impact other participants from the school district. If you find out that one district is prepared to send all cafeteria managers and food vendors, then you can adjust your focus and research to support enhancing food services.

Try to be as specific as possible. Capture the titles of anticipated participants. Keep in mind the minimum and maximum number of attendees permitted based on your level of comfort. The optimum student-to-teacher ratio is 25-30 per trainer, with a maximum of 35. The number of attendees will also affect the type of facility chosen and workshop layout to create a comfortable, learning environment.

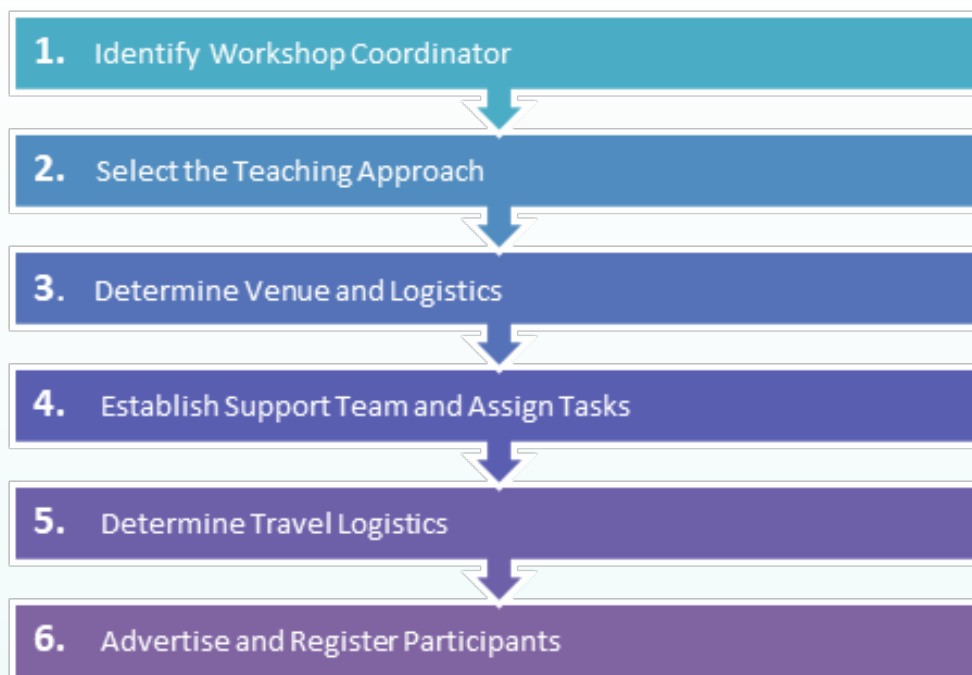
- **Determine the Dates**

Ask for two dates: the preferred date and an alternate date. Make sure the dates are far enough in advance for you to review and tweak your workshop agenda and plans, and there is enough lead time for participants to register and arrange travel. We will address the logistics in the next part of this section.

As you talk with the host or liaison, try to gauge his or her level of interest in the workshop. If you are working with several liaisons, determine interests, levels of commitment, and availability to continue for each liaison. The liaison could be the main coordinator for all interested staff members from different schools. There may be other ways the requesting host or liaison can help.

Your conversations about workshop coordinator tasks and expectations will also help you determine the level of support and additional roles needed.

You are taking the first of six steps in organizing the workshop.



Step 1: Identify Workshop Coordinator

You have initiated conversations with a potential workshop coordinator. Determine who would be the best choice to serve as your workshop coordinator and ask them to join the team. Be prepared to talk about the responsibilities, the length of time anticipated, and time commitment. Share your personal excitement and the potential outcomes. For new school staff, this is an excellent way to get to know fellow staff members as well as an opportunity to demonstrate leadership. Listen to what is important to them. You may be able to connect with others who agree to be a part of the team.

A review of key considerations previously provided and actions to complete:

- Check the requested date(s), time(s), and location(s) to ensure you are available.
- Determine if the workshop requestor can serve as the workshop coordinator.
- Determine potential contact(s) who may serve as the workshop coordinator if the requestor cannot perform this function.
- Invite the suggested contact to join the team. Note: It may be helpful to reference the workshop requestor who made the recommendation upon initial contact.
- Obtain a commitment from the workshop requestor or suggested contact for before and after the workshop.
- Provide a copy of the Workshop Coordinator Roles and Responsibilities document with modifications discussed, or continue to seek guidance for additional contacts from the workshop requestor.

Step 2: Select the Teaching Approach

The SHI workshop can be facilitated with or without participant computers, if available, as mentioned in sections 1 and 2. If taught with computers, there should be internet access for participants to access the SHI online to practice using the tool during the workshop.

Summary of Key Considerations / Actions to Implement

- Potential issues to address if computers will be used:
 - Are there computers or tablets?
 - Computers with internet access are ideal because some tablets may not load content properly.
 - How many computers do you need?
 - A computer for each participant is ideal, but not necessary. Participants may be instructed to bring their own computers to ensure everyone has one. Alternatively, participants may share computers if resources are limited.
 - Is there internet access?
 - Internet access is required to show the SHI online, as well as connecting to the SHI eLearning module.
 - Is a passcode required for the main computer? Participant computers?
 - Be sure to obtain any necessary passwords.
 - Are there any firewall restrictions?
 - Test access to any websites you will visit during training to ensure there are no restrictions.
 - Do your required websites pass the firewall?
 - If necessary, work with the IT department or other staff in advance to ensure your websites can pass the firewall.
- Will you be using the eLearning module in combination with the SHI: Self Assessment and Planning Guide and SHI online?

Use the following chart to adapt your session for either traditional workshop learning or a blended approach that includes computer technology.

Summary of Key Considerations / Actions to Implement – Before the Workshop

Workshop (Traditional)	Workshop (With Participant Computers)
<ul style="list-style-type: none"> • Create an agenda • If participants do not have computers: <ul style="list-style-type: none"> • Prepare slide sets with screen shots from the SHI to illustrate points about the tool. • Be ready to share the trainer's screen to show the tool if there is Internet access. • Create activities to test group knowledge. 	<ul style="list-style-type: none"> • Revise the e-mail and registration form to instruct participants to bring their personal computers, power cables, mouse pads, etc. • Ensure internet access is available. • Create activities to engage proficient computer users who may complete the exercises early.
<ul style="list-style-type: none"> • Modify the agenda to incorporate the activities created above. 	<ul style="list-style-type: none"> • Modify the agenda to introduce the eLearning module and the online component of your training.

Summary of Key Considerations / Actions to Implement – During the Workshop

Workshop (Traditional)	Workshop (With Participant Computers)
<ul style="list-style-type: none"> • Introduce exercise breaks to reinvigorate the participants. The workshop agenda incorporates several breaks throughout the training. 	<ul style="list-style-type: none"> • Be aware of gaps between participants' levels of computer proficiency. Proficient users may complete tasks quickly, while other users may need more time or additional support.
<ul style="list-style-type: none"> • Minimize use of PowerPoint to engage participants in discussion. • Use a co-facilitator to help circulate among groups during group activities. 	<ul style="list-style-type: none"> • Enhance use of visuals to change what the participants see often. • Integrate checkpoints to ensure everyone is viewing the same screen.

Step 3: Establish a Support Team and Assign Tasks

The workshop coordinator is a primary asset and the first member of your team. He or she will likely be handling registration, communication, material management, and review of the potential training facility.

Tasks are performed at a faster pace as a team rather than as an individual. **Consider adding other vital members to the team.**

- **Facility Coordinator**

A facility coordinator may be helpful in finding the appropriate site and coordinating all the facility logistics and details, such as scheduling facility meetings, room selection, security, access, equipment, etc. The facility coordinator should have or establish positive relationships with key facility staff, such as the facility manager, business owner, or security coordinator.

- **Co-Facilitator**

A co-facilitator may be helpful if the workshop has a large number of participants or if group activities will be conducted. If you choose to work with a co-facilitator, you should also agree on responsibilities. The Co-Facilitator Checklist can help determine responsibilities for the facilitator and the co-facilitator (see Trainer Resources).

Conduct a team meeting to review needs, expectations, and tasks. Develop time lines and assign tasks. Clear expectations help team members understand their level of involvement, such as how much time they will need to be involved, and the exact role they will play before, during, and after the workshop.

Step 4: Determine Venue and Logistics

Venue and logistics planning requires collaboration between you, the workshop coordinator, facility coordinator, and the planning and implementation team. The requestor or workshop coordinator may already have a facility available. **A word of caution: available does not necessarily mean suitable.** The facility training space should meet audience needs and specifications for training. Participant demographics may require other features, such as

- Physical access or reasonable accommodations for people with disabilities or specific needs in accordance with the Americans with Disabilities Act (ADA)
- Proximity to major highways or food options
- Capacity to comfortably seat the maximum number of participants
- Easy access to restrooms and parking

If a specific facility has not been secured, the requesting host should check with the administration for space to conduct the workshop. Meanwhile, check your resources for a backup training room. Emphasize the value of having the workshop in a location the school staff is familiar with or can easily access. You may discover alternatives by talking to your team members or school connections.

A summary of key considerations and actions to implement follows.

Summary of Key Considerations / Actions to Implement

- Identify action items and assign completion dates.
- Determine if additional support is needed.
- Identify potential venues for the workshop.
- Determine available equipment and supplies.

Setting up the Workshop

Facility access and workshop layout can make or break a training. Participants can become frustrated if they do not know where they are going. On-site facility staff can help by directing participants to the appropriate place. Signage is also helpful.

The size of the room can also make or break a training. The room should be large enough to accommodate all participants comfortably, with plenty of room to move around during the event. Sometimes rooms can be too large, and the participants feel as if they are in a cavern. Be cognizant of the size and "feel" of the room. It should be intimate enough to be able to hear everyone and not too large that it is difficult to be heard.

Step 5: Determine Travel Logistics



Your participants may be coming from all areas of the city, county, or state. Take a moment to set travel expectations and guidelines with your team. They may have ideas and can incorporate these tasks into current responsibilities. Planning for participant arrival will make transition to your facility easier.

Hotel

- Determine if hotel accommodations are needed
- Consider using the hotel's meeting rooms for possible discounts
- Advise hotel of number of participants expected
- Develop welcome packets with key information

Travel

- Determine if air travel is needed
- Provide suggested arrival and departure timelines for travel to coordinate with the workshop hours
- Provide driving directions to the facility from multiple points
- Investigate construction work in progress or anticipated on major highways and access roads
- Avoid high-volume travel periods, if possible (schedule the beginning and end of the workshop before or after rush hours.)

Parking

- Advise of any security requirements
- Determine if there are parking fees or additional costs for entry and exit frequency
- Ensure ample parking is available close to the main entry point

Food

- Decide if food will be offered during the workshop
- Ensure participants are aware of food options, if applicable
- Determine if any participants have food allergies or dietary restrictions
- Check with nearby food vendors for menus and services offered

Ultimately, you should follow the travel procedures for your state or organization.

Once you have determined all anticipated travel logistics, incorporate these details into registration and workshop communications. You may have to adjust the agenda to support your decisions.

Step 6: Advertise the Workshop and Register Participants



Advertising your workshop informs participants, and it increases general awareness and potentially creates more interest. An advertising flyer and invitation e-mail should be prepared, inviting each school to send one or more representatives to the workshop. A sample flyer and registration form are available (see Trainer Resources) and can be customized with your agency's logo.

As you update these materials with your agency logo and workshop specifics, remember to plan for registration. **Decide who will be responsible for advertising the workshop and registering the participants.** Your registration process should be in place before sending out any correspondence. Registration can occur in several ways.

Online

Registering online via a designated Web page requires upfront planning and programming. Make sure the registration link or navigation is easy to recognize and access. Include helpful hints and instructions (e.g., how to register a team, required fields, etc.).

By phone

Registering by phone may be an easy option if you have support to take requests. Determine what phone number will be used. Also remember to update your voicemail greeting to support missed calls.

By e-mail

Another option is to e-mail a registration form in a fillable format. There are a number of sources to use, including a Microsoft Word form or a fillable pdf. Make sure your instructions include steps to access, complete, and send the registration form, and a phone number to call for help.

On-site

This option may seem like the simplest solution, but there are pros and cons. Food planning is difficult when the number of participants is unknown. You might not receive information about dietary constraints in time to make adjustments. If you are not planning to provide food or are not concerned about restricting to a certain number of participants, then waiting to register on-site may be the most feasible option.

All the listed options require an on-site component because there may still be action items to complete upon arrival. For example, all participants may need to pick up their name tags and sign the attendance roster. Talk with your team about the complete registration process.

Developing Your Facilitation Plan

A facilitation plan is your road map to what the participants need to learn and how it will be effectively implemented. The workshop objectives and lessons have been embedded in the SHI: Self Assessment and Planning Guide. (<https://www.cdc.gov/healthyschools/shi/index.htm>) At the end of this SHI workshop, your participants should be able to



- **Identify the purpose of the SHI**
- **List examples of changes schools have made as a result of the SHI**
- **Explain the format of the SHI**
- **List the steps involved in implementing the SHI**
- **Develop an action plan for implementing the SHI**
- **Create a SHI team at their school**
- **Complete the SHI assessment based on their health topics and school health vision**

You must put on the facilitator planning hat as you review the plans. During the conversation with the requestor of the training, you identified some of the audience's expectations and goals. You may have to tweak your introduction, the slide content, and/or activities to better suit your audience. If you have staff from a highly technical, innovative school or have easy access to computer equipment, you may consider taking a more technological approach in the workshop.

Integrate Adult Learning Concepts

Your participants bring different backgrounds and experiences that can create valuable workshop discussions, so you should plan to manage different learning styles and preferences. Adding adult learning concepts and principles into your revised content and activities will only strengthen the training. (see Training Resources)

Update "Making the Case"

- **Credibility is essential.** Credibility is the degree to which someone or something is deemed trustworthy and believable. The "Making the Case" portion of Section 1 of Your Guide to Using the SHI helps to further establish credibility of the SHI tool and its use for your audience. Consider customizing some slides with your own data (Youth Risk Behavior Survey, School Health Profiles) to REALLY make the case, by driving the point home about data pertaining to absenteeism, graduation rates, and physical inactivity to name a few.
- **Use the "Making the Case" in Section 1 for achieving participant buy-in.** Participants can also use the concepts in Section 1 to explain the link to health-saving measures and academic achievement. Work with your team to figure out what health topics are most important to the planned audience. Create and/or revise the slides to speak and appeal to your participants' priority school health concerns. Research statistics and pull case studies to bridge credibility with the value the SHI provides.

Assemble Participant Packets

All workshop materials should be organized into participant packets before the workshop. Materials include printed versions of the SHI: Self Assessment and Planning Guide (this is a fairly large document, so you may want to only print out certain sections for the workshop), PowerPoint presentations, handouts, evaluations, and certificates. The team can assist you in organizing all handouts and supplies.

Some key considerations and actions when preparing the packets:

Summary of Key Considerations / Actions to Implement

- Prepare a list of all required materials, SHI: Self Assessment and Planning Guide (determine how many of each manual are needed – Elementary or Middle/High School) and any additional materials that you would like to incorporate.
- The List of Materials to Print may be helpful. This list indicates which documents should be provided electronically and which should be printed.
- Print a proof of all materials and review for accuracy. The workshop coordinator should also review for completeness prior to printing.
- Materials should be printed in black and white, double-sided if possible. PowerPoint handouts should be printed three slides per page.
- Print the materials to hand out during the workshop or send electronically in advance. You may set up an online directory for participants to download the materials if you have the resources to do so.
- Make copies of the evaluations and include in the participant material packets.
- Double-check certificate names with those listed on the class roster.
- Distribute hard copies printed on certificate paper at the end of the workshop, or e-mail PDF versions of the certificates to participants after the training.

Planning for Follow-Up Support, Evaluation, and Certificates

This section reviews some of the final planning steps in preparation for your upcoming SHI workshop.

Follow-Up Support

Follow-Up Support (FUS) planning should begin before your SHI workshop. FUS is critical to successfully integrate SHI concepts when establishing or developing a new curriculum, policy, and/or environmental change. Include your team and plan your SHI workshop follow-up strategies using the Professional Development (PD) Practices card, FUS Continuum, Guiding Questions and Planning Guide documents for guidance (see Trainer Resources).

Start your FUS planning preparation by considering use of the FUS tools from the participant's perspective. For example, one of the FUS Guiding Questions asks, "How will you determine participant capabilities?" Participants will need your guidance to apply these concepts to developing action plans for their schools and/or districts. FUS planning requires you determine

- **What data are important**
- **How you will collect the data**
- **Ways to assess your FUS strategies**

Take a moment to develop examples and activities that will help participants accomplish this task. Lastly, don't forget to integrate evaluation measures as part of your FUS planning process. (https://www.cdc.gov/healthyschools/tths/pd_follow_up.htm)

Professional Development – Follow Up Support Tips

PD and FUS planning should begin before a professional development event. A professional development event can include training, such as the SHI workshop, or introduction of a health-related program, activity, or policy.

Evaluation

Both the workshop and FUS must have specific measures and outcomes. Your workshop evaluation should include checkpoints (verbal or written) throughout the training to check for understanding. Determine how you will introduce checkpoints throughout your workshop. A Guide to Evaluating Your Professional Development can be found <https://www.cdc.gov/healthyschools/trainingtools.htm> and will be a wonderful resource for you when considering your evaluation process and outcomes.

Post-training feedback from the participants can be valuable for gauging training effectiveness. Changes to the agenda may require changes to the evaluation form. Review the evaluation measures to make sure they are relevant to your content additions.

Certificates

Certificates can be used as documentation for attendance or reward for completion of training (see Trainer Resources). As you create certificates, think about how you will acknowledge and/or reward participants for reaching PD and FUS milestones.

Tips on integrating evaluation and certificates follow.

Summary of Key Considerations / Actions to Implement

Follow-Up Support and Evaluation:

- Use Professional Development and Follow Up Support documents to determine ways to obtain key information and frame actions and tasks.
- Plan for participants' next steps to help determine timelines to implement new skills, policies, or behavior.
- Update the workshop evaluation form to collect appropriate data or information, as appropriate.

Certificates (see Trainer Resources):

- Sign and date the certificate.
 - Consider creating and inserting an electronic signature on the certificate template. Your workshop coordinator may be able to help do this task.
 - Obtain the electronic signature of others who authorized the workshop, if appropriate.

Key Points and Takeaways

1. **You as a SHI Champion and trainer will take on multiple roles: promoter, manager, facilitator, and coach**
2. **Workshop planning is critical to a highly successful event**
3. **Decide whether or not you will use the online or print version of the SHI**
4. **Include Adult Learning Theory and Follow Up Support strategies**
5. **Remember that evaluating your workshop is vital for future endeavors**

Now you're ready for a productive and informative SHI workshop! Enjoy the experience, knowing that you are making a difference in the schools, students, families, and communities of those whom you have touched in the process.

Questions

There are a number of sources you can contact if you have questions about your role as a trainer, about leading a team, or about the School Health Index. CDC Healthy Schools staff have extensive knowledge about program content, partners, and updates to the online SHI tools. A CDC Healthy Schools staff member will reach out to answer any questions you may have. Check out all of the tools and resources that are available to you and your school and district at the link below.

<https://www.cdc.gov/healthyschools/>

Appendix A: School Health Index FAQs

Basic Information

What are the benefits of using the SHI?

The SHI allows schools to use an evidence-based assessment to identify the strengths and weaknesses of their school's health and safety policies and programs. Once schools are able to identify and address their weaknesses, they may

- **Increase students' capacity to learn.**
- **Reduce absenteeism.**
- **Improve physical fitness and mental alertness.**
- **Reduce aggression and violence.**
- **Reduce/prevent alcohol, tobacco and other drug use.**
- **Reduce punitive disciplinary actions.**
- **Increase academic achievement.**
- **Increase student attachment to school.**
- **Improve social and emotional skills, such as self-regulation, communication, and problem solving.**
- **Raise awareness and garner support for school health initiatives.**

The SHI enable schools to

- **Identify strengths and weaknesses of their health and safety policies and programs.**
- **Develop action plans for improving student health, which can be incorporated into the School Improvement Plan.**
- **Engage teachers, parents, students, and the community in promoting health-enhancing behaviors and better health.**

What framework is the 2017 SHI based on?

The 2017 SHI is aligned with the Whole School, Whole Community, Whole Child model (WSCC). The WSCC is an approach that focuses on the child to align the common goals of both education and health. The WSCC model integrates the eight components of CDC's coordinated school health (CSH) model with the tenets of ASCD's Whole Child approach to education to support a collaborative approach to learning and health. The WSCC model emphasizes a school-wide approach to student health. By providing a learning environment that ensures each student is emotionally and physically healthy, safe, actively engaged, supported, and challenged, the WSCC model presents a framework for school systems to evaluate, streamline, implement, and sustain policies, processes, and practices.

What are the differences between the elementary school SHI and the middle/high school SHI?

The majority of the items in the two versions are identical. However, there are a few questions that are targeted toward school level. For example, the elementary school SHI includes questions about recess and hand washing that are not included in the middle/high school SHI. The middle/high SHI asks about tobacco cessation services.

Also, there are certain questions that are included in both versions but reflect different requirements for the school levels. For instance, the elementary school SHI suggests a total of 150 minutes of physical education per week, whereas the middle/high school SHI suggests a total of 225 minutes per week.

How much does it cost to get copies of the SHI?

The SHI is available free of charge. You can select either the interactive, customizable online tool or the downloadable, print version.

Will it cost my school money to implement the SHI?

The SHI materials are available free of charge. The main cost associated with the SHI is time. Many schools have done it with no funding at all—merely getting some dedicated time (perhaps part of a staff development day or teacher workday) for the school health team to come together to complete the self-assessment modules and create an action plan. Some schools have received a small amount (\$500–\$1,000) of seed money to pay for substitute teachers and materials for their SHI team meetings.

Once schools have developed their action plans, many have been able to implement some of the actions with no funding at all. For activities that might require some funding, many schools have used their SHI results to help obtain money or donated resources/time from community organizations, local businesses, state/local agencies, etc. In addition, SHI results have also influenced changes in policy and practice within schools, which may require allocation of resources in district and school budgets.

How long will it take to complete the SHI?

Field testing of the SHI has shown that it can be completed in as little as 6 hours, though this will vary depending on the amount of time needed to collect information or for discussion.

Can charter and magnet schools use the SHI?

Any type of school can use the SHI to identify the strengths and weaknesses of their health and safety policies and programs and develop action plans for improving student health. If you are using the online SHI, the state district ID and state school ID, required during registration, will identify your charter or magnet school. Users who already have Reference Numbers also can access these ID numbers by going to the “My SHI Options” tab located on your SHI home page, scrolling down, and opening “Edit Team Information.”

Which organizations did the CDC collaborate with on the development of the new SHI?

CDC collaborated with ASCD, the Alliance for a Healthier Generation, Action for Healthy Kids, and a variety of other internal and external partners on the development of the new SHI. Both the Alliance for a Healthier Generation and Action for Healthy Kids have adopted an abbreviated version of the SHI as its sole assessment tool to guide school-based obesity prevention and health promotion. The abbreviated versions include only the nutrition and physical activity health topics, plus some cross-cutting school health questions.

Using SHI

Should I use the online version or the print version of the SHI?

The SHI can be completed online or on hard copy. Both methods are equally effective. Many schools have found that the online version saves time, because it allows you to

- **Customize your SHI based on the health topics (e.g., physical activity and physical education, nutrition, tobacco-use prevention, alcohol and other drug use prevention, safety, chronic health conditions, sexual health) you would like to address.**
- **Save your responses in the system.**
- **Leave and re-enter the system as often as you would like.**
- **Have your module scores be calculated automatically.**

- **Archive previous versions of the SHI, which may assist in record-keeping for schools who plan to complete the SHI annually.**
- **Print and share Scorecards and School Health Improvement Plans with team members, administrators, and others.**

Can one person complete the SHI for my school?

No. The SHI is meant to be completed by school health teams. This gives teachers, administrators, students, parents, and community members a means of contributing to school health promotion by involving them in the assessment process and inviting them to help shape plans to improve school programs. Multiple people can access the same SHI online allowing the right people to answer relevant questions.

Do I need permission to use the SHI?

No. The SHI was developed with federal funds by a federal agency, so you do not need any permission to use it.

How frequently should we use the SHI?

Some states and districts require schools to conduct the SHI annually. The SHI's School Health Improvement Plan can be used to develop actions that you will take over the next 3 to 5 years. If you establish a 3 to 5 year plan, review your progress annually and reassess every 2 to 3 years.

What do we do if a question does not apply to our school?

It is possible that some questions might not be relevant for every school. If you are sure that this is the case, you may choose not to answer the question. If you are using the online SHI, you can select "not applicable" as your response. If you are using the paper version of the SHI just remember to appropriately adjust the denominator used for calculating the Overall Module Score (i.e., subtract 3 points for each question deleted.) In many cases, questions that might appear to be irrelevant can be re-interpreted to become relevant. For example, a question might ask about the school's gymnasium or cafeteria, and your school might not have a gymnasium or cafeteria. However, if students participate in physical education or eat meals somewhere on campus, you can modify the question to make it fit your circumstances. If meals are cooked off-site at a central cooking facility, it might be harder for you to obtain information about food preparation practices and to influence those practices – but it can be done. Planning Question 3 will ask you to consider feasibility. Trying to influence practices at a central cooking facility might not be a high priority for your school because it might rate low on feasibility.

Our school has a lot of staff turnover. Do we have to restart the SHI process every time we have new staff?

No. The SHI is meant to be completed by school health teams. This gives teachers, administrators, students, parents, and community members a means of contributing to school health promotion by involving them in the assessment process and inviting them to help shape plans to improve school programs. Multiple people can access the same SHI online. Be sure to share your Reference Number with all the members of your SHI Team so that you will not lose access to your SHI online if someone leaves the school community. You can add team members' e-mail addresses to your SHI team information to make sure that your Reference Number is not lost when one person leaves the school community. To update this information, go to the "My SHI Options" tab located on your SHI home page, scroll down, and open "Edit Team Information."

How do I access the Healthy School Program's version of the SHI for the Alliance for a Healthier Generation?

The Healthy Schools Program (HSP) External has adopted the CDC's School Health Index (SHI) to help schools assess progress in their program. The HSP website hosts a version of the SHI that includes only the nutrition and physical activity health topics, plus some cross-cutting school health questions. School personnel solely interested in the nutrition and physical activity health topics for the purposes of the HSP assessment are encouraged to complete the SHI on the HSP website (https://schools.healthiergeneration.org/dashboard/about_assessment/?_actionExternal).

Why do some questions ask about whether a school does something instead of how many teachers do it?

The SHI looks at practices that take place throughout the school or are promoted by the school. It can be very difficult to find out exactly how many teachers or other staff members actually engage in each specific practice and to change the behavior of every single teacher or other staff member. On the other hand, school administrators and other members of the SHI team can change school practices. For example, they can use a variety of methods to inform students and staff members about policies to prevent harassment or bullying or they can challenge staff members to greet each student by name.

Why do some questions ask about whether schools implement a policy instead of whether they have a policy?

Most school policies are established by states or school districts, not schools. Policies only matter if they are implemented fully and correctly. The SHI asks about policy implementation because that is what people in the school and community are most able to control and change.

Why is employee wellness and health promotion part of the SHI?

Employee wellness and health promotion is an integral part of the Whole School, Whole Community, Whole Child model. Employee wellness and health promotion activities enable all school employees to improve their health status, which contributes to improved morale and a greater personal commitment to the school's overall coordinated health efforts. This personal commitment often transfers into greater commitment to the health of students and creates positive role modeling.

Account Management

Two members of our team completed their module questions in two different accounts. Is there a way to merge the questions into one SHI?

No. Multiple accounts cannot be merged. The completed modules from separate accounts must be manually entered into one SHI account for the school. Multiple people from one school health team should access the same SHI online by using the same Reference Number.

Do I have to create a new account for every year we do the assessment?

No. You should use the same account (the same Reference Number) and create a new SHI under that account. A new SHI can be created by clicking the "Create a new SHI" link after you sign in. Note that when creating a new SHI, the current SHI will be archived and you can no longer make changes to this archived version.

Evaluation and Results

Do I have to report my results from the SHI to the CDC?

No. The CDC does not ask that schools report their scores. The SHI is a self-assessment process, and the data are not meant to be reported to outside agencies for the purposes of comparison.

Will my school be punished if we score poorly on the SHI?

Absolutely not. The SHI will help the school determine its own strengths and weaknesses solely for the purposes of self-improvement.

Has the SHI been tested for validity and reliability?

The School Health Index was field tested for readability and user-friendliness. We have no validity and reliability data for the simple reason that the SHI is not a research tool; it is a community organizing and educational tool.

Has the SHI been evaluated?

Several articles have been published in scientific journals that have evaluated the SHI implementation process and described the results of the process. Other studies have used the items from the SHI as indicators of best practices:

- Austin SB, Fung T, Cohen-Bearak A, Wardle K, Cheung LWY. [Facilitating change in school health: a qualitative study of schools' experiences using the School Health Index](#). *Preventing Chronic Disease*. [serial online] 2006 Apr.
- Brener ND, Pejavara A, Barrios LC, Crossett L, Lee SM, McKenna M, Michael S, Wechsler H. Applying the School Health Index to a nationally representative sample of schools. *Journal of School Health*. 2006;76(2):57–66.
- Brener ND, Pejavara A, McManus T. Applying the School Health Index to a nationally representative sample of schools: update for 2006. *Journal of School Health*. 2011;81(2):81–90.
- Pearlman DN, Dowling E, Bayuk C, Cullinen K, Thacher AK. [From concept to practice: using the School Health Index to create healthy school environments in Rhode Island elementary schools](#). *Preventing Chronic Disease* [serial online] 2005 Nov.
- Staten LK, Teufel-Shone NI, Steinfeldt VE, et al. [The School Health Index as an impetus for change](#). *Preventing Chronic Disease*. [serial online] 2005 Jan.

If I'm using the online version of the SHI, will my scores be automatically submitted to my school district or state?

Your online SHI scores will not be automatically sent to anyone. The only way your school's information can be viewed is using your reference number.

Troubleshooting

What is a reference number?

Access to the online SHI requires a CDC system-generated Reference Number. You will use your Reference Number like a user id and password. Unlike a password, however, you should share the Reference Number with all the members of your SHI Team who may need to access your SHI online. New users should complete information required to register a new team, after which you will receive your Reference Number by automated e-mail response. The information requested during registration will allow you to enter e-mail addresses for other team members who will also receive the Reference Number by automated e-mail response. Anytime you enter your SHI, you can update your team information to ensure access to your Reference Number in the future. This is important in case it is lost or misplaced, you change your e-mail address, or updates are necessary due to personnel or team member changes. To update this information,

go to the "My SHI Options" tab located on your SHI home page, scroll down, and open "Edit Team Information."

I have completed the online SHI in the past for my school and I need to do one for this year but all the module questions are marked "completed." What do I do?

You will need to complete a new SHI for this year. Create a new SHI by clicking the "Create a new SHI" link. Note that when creating a new SHI, the current SHI will be archived and you can no longer make changes to this archived version.

I chose to assess only one health topic. Why do all of the modules appear in my SHI?

Questions in the SHI are grouped and labeled by topic area. Cross-cutting questions address issues that are relevant to all health topics. Grouping questions allows schools to choose to address some, but not all, of the health topics covered by the SHI. The eleven modules of the SHI are not organized by health topic. Instead, they are structured around the Whole School, Whole Community, Whole Child model. This model emphasizes a school-wide approach to student health through ten interactive components. Cross-cutting questions appear in nine of the eleven modules (i.e., every module except Physical Education and Physical Activity Programs and Nutrition Environment and Services.) All of the cross-cutting questions will appear regardless of which health topic or topics you choose. Topic-specific questions appear in every module, but every topic does not appear in every module.

What do we do if a question does not apply to our school?

It is possible that some questions might not be relevant for every school. If you are sure that this is the case, you may choose not to answer the question. If you are using the online SHI, you can select "not applicable" as your response. If you are using the paper version of the SHI just remember to appropriately adjust the denominator used for calculating the Overall Module Score (i.e., subtract 3 points for each question deleted.) In many cases, questions that might appear to be irrelevant can be re-interpreted to become relevant. For example, a question might ask about the school's gymnasium or cafeteria, and your school might not have a gymnasium or cafeteria. However, if students participate in physical education or eat meals somewhere on campus, you can modify the question to make it fit your circumstances. If meals are cooked off-site at a central cooking facility, it might be harder for you to obtain information about food preparation practices and to influence those practices – but it can be done. Planning Question 3 will ask you to consider feasibility. Trying to influence practices at a central cooking facility might not be a high priority for your school because it might rate low on feasibility.

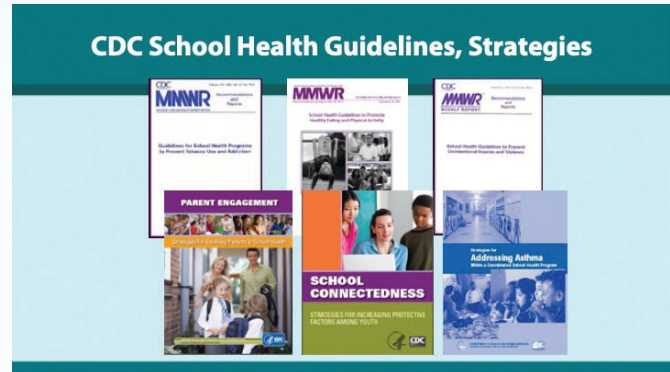
If we are using the online version of the SHI and are only able to complete part of a module, can we save our responses and complete the module later?

Yes, the SHI does not need to be completed all at one time. You may save your responses and return to complete the SHI at your convenience.

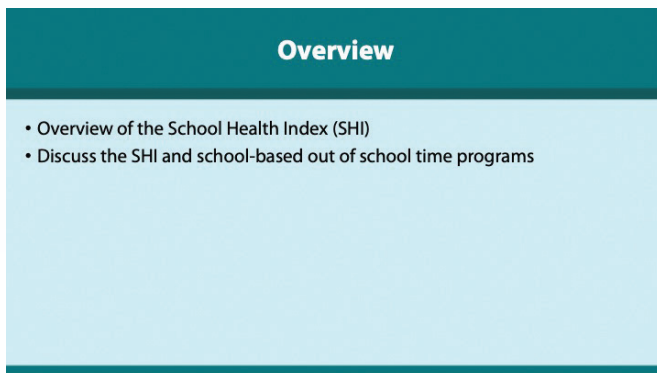
Appendix B: PowerPoint Slides



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slide 5



slide 2

- Overview of the School Health Index (SHI)
- Discuss the SHI and school-based out of school time programs



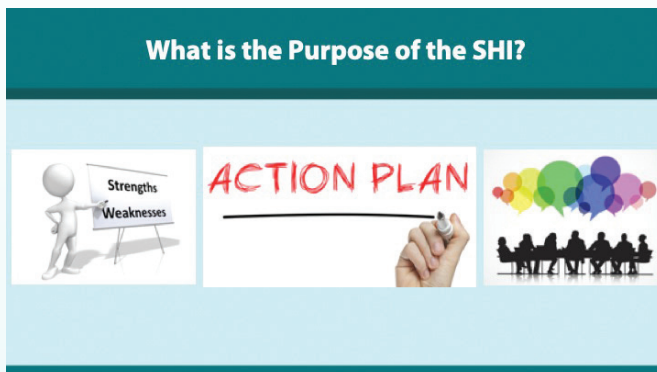
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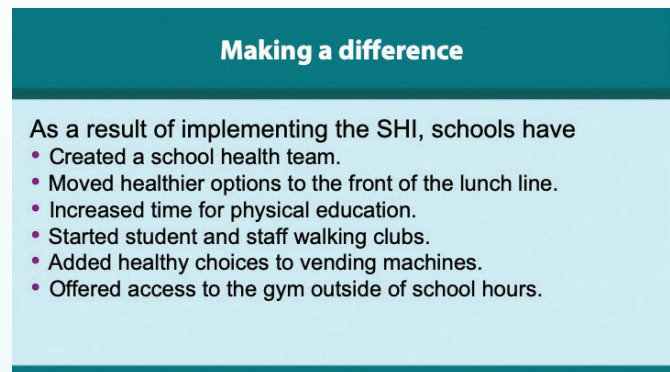
slide 3



slide 7



slide 4



slide 8

- As a result of implementing the SHI, schools have
- Created a school health team.
 - Moved healthier options to the front of the lunch line.
 - Increased time for physical education.
 - Started student and staff walking clubs.
 - Added healthy choices to vending machines.
 - Offered access to the gym outside of school hours.

SHI Format

- Completed by school health **teams**
- Two separate versions:
 - Elementary School
 - Middle School/High School
- **Self-Assessment:** 11 modules
- **Planning:** Planning for Improvement section



slide 9

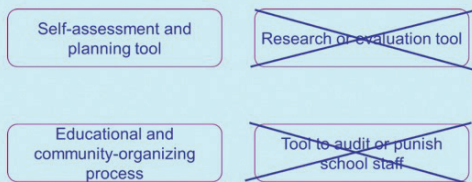
Modules - WSCC components

- Module 1 – School Health and Safety Policies and Environment
- Module 2 – Health Education
- Module 3 – Physical Education and Other Physical Activity Programs
- Module 4 – Nutrition Environment and Services
- Module 5 – School Health Services
- Module 6 – School Counseling, Psychological, and Social Services
- Module 7 – Social and Emotional Climate
- Module 8 – Physical Environment
- Module 9 – Employee Wellness and Health Promotion
- Module 10 – Family Engagement
- Module 11 – Community Involvement



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What the SHI Is and Is Not



slide 10

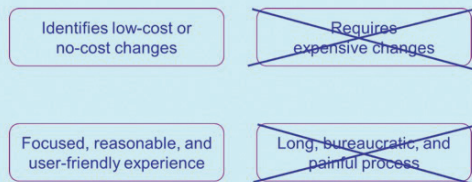


SH Process

- Form a team
- Hold a meeting
- Complete modules and planning questions
- Review results/Create action plan
- Re-evaluate

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What the SHI Is and Is Not



slide 11



SH Process

- Form a team
- Hold a meeting
- Complete modules and planning questions
- Review results/Create action plan
- Re-evaluate

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Clarifying Points


- Low scores on the SHI do NOT indicate “low-performing” schools.
- Many actions will NOT require new resources or responsibilities.
- For actions requiring new resources, results can help
 - Provide information to stimulate school board or community support.
 - Establish data and justification for funding requests.

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Form a Team



slide 16



SHI Process

- Form a team
- **Hold a meeting**
- Complete modules and planning questions
- Review results/Create action plan
- Re-evaluate


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SHI meeting

- Explain the SHI
- Identify module coordinators/teams
- Assign modules
- Provide directions for completing modules and planning questions



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SHI Process

- Form a team
- Hold a meeting
- **Complete modules and planning questions**
- Review results/Create action plan
- Re-evaluate

slide 19

Sample SHI Question

CC.5 Out-of-school programs

Does your school work with community-based, out-of-school programs (e.g., Boys & Girls Clubs, 21st Century Community Learning Centers, Parks and Recreation) to develop and implement routine activities that promote health* for all participating students?

Note: Routine activities that promote health refer to activities that are intended to improve student health status, such as health assessments, health education, and physical activity/physical education.

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Response Options

- 3 = Yes, our school works with out-of-school programs to develop and implement **routine** activities that promote health for **all** participating students.
- 2 = Our school works with out-of-school programs to develop and implement **routine** activities that promote health for **select** participating students.
- 1 = Our school work with out-of-school programs to develop and implement **occasional** activities that promote health for participating students.
- 0 = No, our school **does not** work with out-of-school programs to develop or implement activities that promote health for participating students.

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Sample Completed Score Card

Module 1: School Health and Safety Policies and Environment

Instructions:
 1. Carefully read and discuss the Module 1 Discussion Questions (pages 5-14), which contain questions and scoring descriptions for each item listed on this Score Card.
 2. Circle the most appropriate score for each item.
 3. After all questions have been scored, calculate the overall Module Score and complete the Module 1 Planning Questions located at the end of this module (pages 14-17).

Item	Full	Partial	Occasional	None
Q1.1				
Q1.2				
Q1.3				
Q1.4				
Q1.5				
Q1.6				
Q1.7				
Q1.8				
Q1.9				
Q1.10				
Q1.11				
Q1.12				
Q1.13				
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SCHOOL HEALTH INDEX - ELEMENTARY SCHOOL

Sample Completed Planning Questions
Module 1: School Health and Safety Policies and Environment

The Module 1 Planning Questions will help your school use its School Health Index results to identify and prioritize changes that will improve policies and programs to improve students' health and safety.

Planning Question 1
Look back at the scores you assigned to each question. According to these scores, what are the strengths and weaknesses of your school's policies and environment related to students' health and safety?

<p>Strengths</p> <ul style="list-style-type: none"> Excellent communication of policies with parents, visitors, and staff. Offer a wide variety of enrichment experiences. Students are actively supervised. Have a strong standardized precautions policy. Do not use physical activity as punishment. Free drinking water is widely available and students can bring bottles to class. Students are given enough time to wash their hands before eating. 	<p>Weaknesses</p> <ul style="list-style-type: none"> Do not have a committee to oversee our health programs (CC.1). Local wellness policy has not been implemented at the school level (CC.6). Could make more enrichment experiences available to students (CC.5). Snacks is not provided every day (SB.2). Some teachers still use candy as rewards (B.1). Some food available during the school day does not meet school nutrition standards (B.6).
--	---

Planning Question 2
For each of the weaknesses identified above, list several recommended actions to improve the school's scores (e.g., create and maintain a school health committee).

- Form a school health committee.
- Have the school health committee review the district local wellness policy.
- Conduct staff development or hire new staff to provide enrichment experiences for students.
- Make sure all teachers are providing daily, 20 minute recess.
- Give teachers ideas about non-food rewards.
- Work with the nutrition services staff to make sure all foods meet school nutrition standards.

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SCHOOL HEALTH INDEX - ELEMENTARY SCHOOL

Overall Scorecard [Export Overall Scorecard](#)

For each module, a "✓" appears where the module score falls. Use these scores to create a Plan for Improvement.

Modules	Low		Medium		High
	0-20%	21-40%	41-60%	61-80%	81-100%
Module 1 - School Health and Safety Policies and Environment				✓	
Module 2 - Health Education		✓			
Module 3 - Physical Education and Physical Activity Programs			✓		
Module 4 - Nutrition Environment and Services		✓			
Module 5 - School Health Services		✓			
Module 6 - School Counseling, Psychological, and Social Services					✓
Module 7 - Social and Emotional Climate			✓		
Module 8 - Physical Environment			✓		
Module 9 - Employee Wellness and Health Promotion					✓
Module 10 - Family Engagement		✓			
Module 11 - Community Involvement			✓		

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Module Planning Questions

- Planning Question 3:** List each of the proposed actions identified in Planning Question 2 in the table. Use the scales to rank each action on the five dimensions below. Add the points for each action to get the total points.
 - Importance
 - Cost
 - Time
 - Commitment
 - Feasibility

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Create an Action Plan

- Highlight strengths and weaknesses and two or three actions by module
- SHI team selects manageable number of actions (2 - 4 per year)
- Team mixes short- and long-term actions
- Team completes action plan (action, steps, person responsible, timeline)

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SCHOOL HEALTH INDEX - ELEMENTARY SCHOOL

Planning Question 3. List each of the actions identified in Planning Question 2 on the table below. Use the five-point scales defined below to score each action on five dimensions (importance, cost, time, commitment, feasibility). Add the points for each action to get the total points. Use the total points to help you choose one, two, or three top priority actions that you will recommend to the School Health Index team for implementation this year. The actions with the highest points should be considered in determining your priority actions.

Importance	How important is the action?	5 = Very important	3 = Moderately important	1 = Not important
Cost	How expensive would it be to plan and implement the action?	5 = Not expensive	3 = Moderately expensive	1 = Very expensive
Time	How much time and effort would it take to implement the action?	5 = Little or no time and effort	3 = Moderate time and effort	1 = Very great time and effort
Commitment	How enthusiastic would the school community be about implementing the action?	5 = Very enthusiastic	3 = Moderately enthusiastic	1 = Not enthusiastic
Feasibility	How difficult would it be to attain the action?	5 = Not difficult	3 = Moderately difficult	1 = Very difficult

Module 1 Actions	Importance	Cost	Time	Commitment	Feasibility	Total Points	Top Priority Action?
Form a school health committee.	5	5	4	3	3	20	✓
Have the school health committee review the district local wellness policy.	3	5	2	2	4	16	
Conduct staff development or hire new staff to provide enrichment experiences for students.	5	3	3	5	4	20	✓
Make sure all teachers are providing daily, 20 minute recess.	4	5	4	3	4	20	✓
Give teachers ideas about non-food rewards.	3	5	3	2	3	16	
Work with the nutrition services staff to make sure all foods meet school nutrition standards.	3	2	2	2	2	12	

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SCHOOL HEALTH INDEX - ELEMENTARY SCHOOL

Sample School Health Improvement Plan

Instructions:

- In the first column: list, in priority order, the **actions** that the School Health Index team has agreed to implement.
- In the second column: list the specific **steps** that need to be taken to implement each action.
- In the third column: list the people **who** will be responsible for each step and **when** the work will be completed.

Actions	Steps	By Whom and When
1. Establish a set of competitive food offerings that align with strong nutrition standards.	a. Contact other schools and request to identify different models.	Sally H. 10/2
	b. Conduct taste tests for healthy alternatives that students like.	Mildred P. 10/23
	c. Meet with principal to get support.	Sally H. 10/25
	d. Develop draft competitive food offerings.	Henry T. 11/3
	e. Get feedback from teachers, parents, students, administrators, and community members.	Sally H. 11/15
	f. Develop slide show about new choices to staff, students, parents, and district.	Mildred P. 11/26
	g. Schedule and deliver presentations to staff, students, and parents.	Henry T. 12/2

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Keep in Mind...

- Answer questions as accurately as possible.** This is a self-help tool, not an instrument for punishing staff.
- There is no passing grade.** This is designed to help you understand your school, not to compare your school with other schools.
- You should EXPECT to get at least some low scores.** Low scores can help you build awareness of areas needing improvement.

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- Form a team
- Hold a meeting
- Complete modules and planning questions
- Review results/Create action plan
- **Re-evaluate**

SHI Process

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Keys to success

- School health champion (strong leadership)
- Administrative buy-in
- Team representation, cohesion, and commitment
- Clear, organized, and well-facilitated process (many schools are using outside facilitators)
- Start with small, achievable goals
- Highlight and build on successes

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Images

- <https://www.slideshare.net/SalihIslam/assessing-strengths-and-weaknesses-39955420>
- <https://unbridlingyourbrilliance.com/overcoming-adversity-solid-foundation-action-plan/>
- <https://lomophilly.org/2015/11/09/lomo-general-community-meeting-tonight/community-meeting/>

slide 37

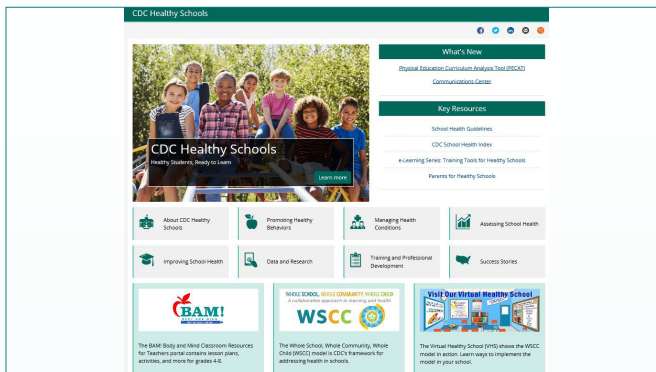
School Health Index

- The full, comprehensive SHI, developed by CDC, is available in downloadable/hard copy pdf and online at: <https://www.cdc.gov/healthyschools/shi/index.htm>
- Alliance for a Healthier Generation's adaption of SHI is available: https://schools.healthiergeneration.org/dashboard/about_assessment/
- Action for Healthy Kids' adaption of SHI is available: https://afhkschoolportal.force.com/AFHK_Communities_Login

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Training Tools for Healthy Schools eLearning Series Promoting Health and Academic Success (TTHS)

- School Health Guidelines to Promote Healthy Eating and Physical Activity (SHG)
- School Health Index (SHI)
- Comprehensive School Physical Activity Programs (CSPAP)
- Parents for Healthy Schools (P4HS)
- Health Education Curriculum Analysis Tool (HECAT)

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Appendix C: Sample Scorecards

SCHOOL HEALTH INDEX – ELEMENTARY SCHOOL

Module 1: School Health and Safety Policies and Environment Score Card

Instructions

- Carefully read and discuss the Module 1 Discussion Questions (pages 5-36), which contains questions and scoring descriptions for each item listed on this Score Card.
- Circle the most appropriate score for each item.
- After all questions have been scored, calculate the overall Module Score and complete the Module 1 Planning Questions located at the end of this module (pages 38-39).

		Fully in Place	Partially in Place	Under Develop- ment	Not in Place
CC.1	Representative school health committee or team	3	2	1	0
CC.2	Written school health and safety policies	3	2	1	0
CC.3	Communicate health and safety policies to students, parents, staff members, and visitors	3	2	1	0
CC.4	Overcome barriers to learning	3	2	1	0
CC.5	Enrichment experiences	3	2	1	0
CC.6	Local school wellness policy	3	2	1	0
CC.7	Standard precautions policy	3	2	1	0
CC.8	Written crisis preparedness and response plan	3	2	1	0
S.1	Staff development on unintentional injuries, violence, and suicide	3	2	1	0
PA.1	Maintain safe play environment	3	2	1	0
PA.2	Recess	3	2	1	0
PA.3/ S.2	Playgrounds meet safety standards	3	2	1	0
PA.4	Access to physical activity facilities outside school hours	3	2	1	0
PA.5	Prohibit using physical activity as punishment	3	2	1	0
PA.6	Prohibit withholding recess as punishment	3	2	1	0
N.1	Prohibit using food as reward or punishment	3	2	1	0
N.2	Access to free drinking water throughout the school day	3	2	1	0
N.3	Access to free drinking water throughout the extended school day	3	2	1	0
N.4	Water testing	3	2	1	0
N.5	All foods sold during the school day meet the USDA's Smart Snacks in School nutrition standards	3	2	1	0
N.6	All beverages sold during the school day meet the USDA's Smart Snacks in School nutrition standards	3	2	1	0
N.7	All foods and beverages served and offered during the school day meet the USDA's Smart Snacks in School nutrition standards	3	2	1	0
N.8	All foods and beverages sold during the extended school day meet the USDA's Smart Snacks in School nutrition standards	3	2	1	0
N.9	All foods and beverages served and offered during the extended school day meet the USDA's Smart Snacks in School nutrition standards	3	2	1	0
N.10	Fundraising efforts during and outside school hours meet the USDA's Smart Snacks in School nutrition standards	3	2	1	0
N.11	Food and beverage marketing	3	2	1	0
N.12	Handwashing practices	3	2	1	0
T.1	Prohibit tobacco use among students	3	2	1	0
T.2	Prohibit tobacco use among school staff members and visitors	3	2	1	0
AOD.1	Prohibit alcohol and other drug use among all students, school staff members, and visitors	3	2	1	0
AOD.2 /T.3	Enforce alcohol, tobacco, and other drug use policies	3	2	1	0
AOD.3 /T.4	Prohibit alcohol and tobacco advertising	3	2	1	0
CHC.1	Written policies for carry and self-administration of quick-relief medications	3	2	1	0
CHC.2	Professional development on chronic health conditions	3	2	1	0
SH.1	Non-discrimination on the basis of HIV infection policy	3	2	1	0
SH.2	Confidentiality of HIV status	3	2	1	0
SH.3	Professional development for all staff members on HIV policies or laws	3	2	1	0
SH.4	Professional development for administrators and teachers on HIV, other STD, and pregnancy prevention	3	2	1	0

COLUMN TOTALS: For each column, add up the numbers that are circled and enter the sum in this row.

(If you decide to skip any of the topic areas, make sure you adjust the denominator for the Module Score (114) by subtracting 3 for each question eliminated.)

TOTAL POINTS: Add the four sums above and enter the total to the right.			
MODULE SCORE = (Total Points / 114) X 100			
			%

Sample Overall Scorecard

Overall Scorecard

[Export Overall Scorecard](#)

For each module, a "✓" appears where the module score falls. Use these scores to create a Plan for Improvement.

Modules	Low		Medium		High
	0-20%	21-40%	41-60%	61-80%	81-100%
Module 1 - School Health and Safety Policies and Environment					
Module 2 - Health Education					
Module 3 - Physical Education and Physical Activity Programs					
Module 4 - Nutrition Environment and Services					
Module 5 - School Health Services					
Module 6 - School Counseling, Psychological, and Social Services					
Module 7 - Social and Emotional Climate					
Module 8 - Physical Environment					
Module 9 - Employee Wellness and Health Promotion					
Module 10 - Family Engagement					
Module 11 - Community Involvement					

Appendix D: School Health Improvement Plan

SCHOOL HEALTH INDEX - ELEMENTARY SCHOOL

Sample School Health Improvement Plan

Instructions

1. In the first column: list, in priority order, the **actions** that the School Health Index team has agreed to implement.
2. In the second column: list the specific **steps** that need to be taken to implement each action.
3. In the third column: list the people **who** will be responsible for each step and **when** the work will be completed.

Actions	Steps	By Whom and When

Appendix E: Consensus Building

CONSENSUS BUILDING

The School Health Index is meant to be completed in teams. Teamwork allows for an exchange of ideas that can be extremely productive. However, using teamwork to develop an action plan to improve school health can also be a challenging task.

Consensus requires time; active participation; good listening and communication skills; open-mindedness and creative thinking by all.

Below is an activity that you can use with your team(s) if they need further help in coming to agreement or consensus.

ACTIVITY:

Step 1 – Brainstorm using one of the following techniques:

- Free style - encourage participants to share ideas and write them on a flip chart. Ensure that no discussion or value judgements are made about the ideas.
- Post-it – Give each participant a stack of Post-it notes and ask them to write each of their ideas on separate Post-its. Then, stick all of the Post-its onto a flip chart. Let the group decide if there are duplicates that can be removed.
- Graffiti Method – Use flip chart paper to write down at the top of each sheet a key topic to be discussed. Post the sheets on the walls around the room. Allow participants time to walk around and write their ideas directly on the paper. Review and discuss the comments as a group.

Step 2 – Clarify and rank ideas by:

- Multi-voting – involves grouping ideas on the brainstorming list into similar categories, then number each idea. Next, have participants select the few items they feel are the most important or most interesting. Go down the list of items and ask participants to say which ones they believe are the most important. Participants can also vote by placing stickers next to their choices or by secret ballot. Tally the votes and select the items with the most votes. Finally, discuss, debate, clarify and “sell” the items with the highest votes.

Remember: Consensus is finding an acceptable proposal that all members can support!

Trainer Resources: Workshop Certificate


TRAINING
TOOLS for
HEALTHY
SCHOOLS
Promoting Health
and Academic Success

Centers for Disease Control and Prevention • Division of Population Health/School Health Branch

Certificate of Completion

Name _____

has successfully completed the
School Health Index Workshop

X contact hours
on the x day of x, 20xx in city, state

Workshop Trainer _____  

Trainer Resources: School Health Index Flyer



The School Health Index Workshop



Sponsored by: insert name of organization(s)

What is the School Health Index (SHI)?

The SHI is a self-assessment and planning tool for schools to improve their health and safety policies and programs.

Who should attend? insert appropriate audience

When and where will it be held? insert date, time, and location

How much will it cost? insert any registration fees

What is the registration deadline? insert date

How do I register? insert registration form or direct people on how to register



For more information, contact:

insert contact information

Trainer Resources: Participant Agenda



CDC School Health Index (SHI)
Workshop Agenda Template
 City _____
 Date _____

DAY ONE		
Time		Facilitator
	Welcome and Overview of Workshop Expectations Let's Get Acquainted (if needed)	
	SHI Workshop <ul style="list-style-type: none"> - Agenda - Training Overview and Objectives - Resources 	
	Section 1 - Introduction Background and Overview	
	Making the Case (customize with local data as needed)	
	Exercise Break	
	Section 2 – Implementation and Consensus Building	
	Section 3 - Planning for Improvement/Action Planning	
	Online SHI SHI Q and A SHI Resources Review and Closing	

Trainer Resources: Training and Facilitation Tips for Adult Learners

Training and Facilitation Tips for Adult Learners

Best practices and techniques to ensure participants are actively engaged and involved in the learning process.

Setting the Stage

Create an environment for learning by:

Setting up in advance	Conveying preparation	Setting group agreements
<ul style="list-style-type: none"> Set up your training space before participants arrive – a conversation circle or horse-shoe shape is more conducive to a participatory learning environment. Test and ensure all AV and technical issues are addressed (e.g. internet connectivity, sound, etc.). Prepare participant packets with needed materials to minimize passing out paper. 	<ul style="list-style-type: none"> Ensure body language is relaxed and confident. Communicate with the appropriate volume, tone, and pace. Engage your audience with eye contact, appropriate gestures, and movement. 	<ul style="list-style-type: none"> Set agreements at the beginning of the training. Propose sample agreements to stimulate thinking. Allow participants to co-create agreements. Ask for clarifications and ensure group consensus. Revisit, as needed.

Design effective materials

- Powerpoints:** Limit text on slides - aim for no more than 5 lines per slide; 5 words per line.
- Show, don't tell:** Utilize graphics and visuals to appeal to emotions and inspire action.
- Formatting:** Ensure readability (font size, sufficient contrast against background) and consistency throughout the presentation.

Read and Adapt to your Audience

Set up an environment conducive for learning through the following:

- Be realistic with your time:** Less is more. Do not cram in your content. Create space for introductions, transitions, questions, and the unexpected.
- Incorporate varied processing styles:** Create opportunities to process individually, in pairs, in small groups, and as a full group.
- Engage multiple intelligences:** Diversify facilitation techniques by utilizing movement (kinesthetic); art (visual or spatial); networking and sharing (interpersonal); individual reflection (intrapersonal); problem solving (logical); storytelling and verbal delivery (linguistic); etc.
- Take time to reflect:** Provide time to process the information presented by asking reflective questions about activities or content, particularly after large sections of content. Ideally, reflection should take place approximately every 18-20 minutes.
- Build in stretch breaks and brain boosters:** Encourage participants to stretch, walk, or move after periods of sitting; build in movement and physical activity into training activities; incorporate energizers or brain boosters to prevent or address waning energy (i.e. a brief activity aimed at increasing energy in a group through physical activity, laughter, problem-solving, etc.).

Utilize a Variety of Facilitation Techniques

The following is a sampling of facilitation strategies, grounded in adult learning theory:

Activity	Description
Brainstorming	As a group, a question or topic is posed, and participants generate ideas quickly, without editing oneself or each other. There are no bad ideas in a brainstorm, so

Trainer Resources: Training and Facilitation Tips for Adult Learners

	quantity of ideas over quality is emphasized. Refinement occurs at a later stage. Ideas are charted on a flipchart.
Round Robin (also known as World Café or Carousel Brainstorming)	Around the room are multiple flip charts with different headings, topics, or questions. Participants are broken up into small groups (typically matching the number of flipcharts). Each group starts at one flipchart and are given time to record ideas. After some time, small groups rotate to the next flipchart and add new ideas not already recorded. The process repeats until all groups contribute their ideas to all flip charts.
Open Space Technology	Open space technology enables participants to engage in conversations around topics that matter to them. As a large group, participants brainstorm topics of interest. Then, individual participants volunteer to lead discussions around specific topics that resonates with them. Those who want to join that discussion can freely do so. Throughout small group discussions, people can move between groups as they desire using the Law of Two Feet: <i>If you find yourself in a situation where you are not contributing or learning, move somewhere where you can contribute or learn.</i>
Barrier Busting	Participants identify challenges or barriers that they face within a topic area of focus. In small groups, participants then take on one of the barriers and brainstorm strategies to address their assigned or chosen barrier. This facilitation technique utilizes peer expertise and experiences to solve problems or challenges faced by other participants.
Think Pair Share	Participants think about the content posed, then work together or reflect on that same content with a neighbor or another partner. Pairs share back their work or reflections with the larger group.
Small Groups	Participants are separated into small groups to complete an activity. Participants can be broken up with the aim of concentrating or dispersing expertise, allowing for networking among and blending of participants, and/or to allow for smaller group processing.
Straw Poll	Participants vote (via hand raising, dot voting, etc.) to decide on the next activity or content focus.
Action Planning	Participants practically apply learnings to their work by identifying realistic goals, objectives, action steps, timeline, and/or roles/ responsibilities.
Teach Backs	In small groups, participants practice and present back material learned to the larger group. Teach back content pieces or scenarios should be prepared in advance and participants should be given enough time to prepare presentations.
Role Plays	Participants are given an imaginary scenario that reflect real-life situations, and individuals take on and act out specific roles with one another. Role plays can be prepared in advance or done on the spot.
Reflection or Processing	Through guided open-ended questions, participants periodically reflect upon the content or activities conducted throughout the training and think about how they can apply learnings to their own work or context.

Trainer Resources: Co-Facilitation Checklist Tool

Training Cadre Resource Tool

Co-Facilitation Checklist

Instructions: Use this checklist as a starting point for items to consider. Customize this document, adding relevant information as appropriate or removing information that does not apply to your situation.

In General

Check Box	Considerations
<input type="checkbox"/>	Spend time together (face-to-face is optimal)
<input type="checkbox"/>	Identify personality styles of trainers
<input type="checkbox"/>	Identify potential barriers in personality style differences
<input type="checkbox"/>	Agree on feedback loop (e.g., when, where, and how you will provide feedback to one another)
<input type="checkbox"/>	Assess comfort level in facilitating training
<input type="checkbox"/>	Assess skill level in facilitating training
<input type="checkbox"/>	Agree on what constitutes a quality training
<input type="checkbox"/>	Agree on key research-based and best practice elements of training design
<input type="checkbox"/>	Agree on roles and responsibilities/division of labor
<input type="checkbox"/>	Agree on communication “signals” to use
<input type="checkbox"/>	Agree on strategies for boundary setting and dealing with difficult situations
<input type="checkbox"/>	Agree on process for self-reflection and feedback loop for one another

For Each Training

Check Box	Considerations
<input type="checkbox"/>	Schedule pre-meeting meeting(s)
<input type="checkbox"/>	Agree on training objectives/outcomes
<input type="checkbox"/>	Agree on training design
<input type="checkbox"/>	Agree on roles and responsibilities
<input type="checkbox"/>	Schedule time for feedback

Notes:

Developed by or adapted from RMC Health Professional Development Partnership,
funded by the Centers for Disease Control and Prevention

U.S. Department of Health and Human Services

Centers for Disease Control and Prevention
National Center for Chronic Disease Prevention and Health Promotion
Division of Population Health