

# Supporting Active Communities: A Movement Framework and Guide to Action

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The NCBW / ALRC Active Community Schools Workbook



Developed by the National Center for Bicycling & Walking  
and the Active Living Resource Center with  
support from The Robert Wood Johnson Foundation

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Every year people in hundreds of communities across the United States come together with the goal of increasing the vitality of their neighborhoods, transforming them into places for active, healthy living. Parent groups strategize how to improve the safety of streets for children traveling by foot to school. Environmental activists seek to improve connections in bike routes for carbon-free commuting. Public health advocates aim to champion area parks and trails as great places for exercise as a means of addressing issues of overweight and obesity.

These resources are for those communities that meet their goals – their kids walk to school on safer streets, their road networks improve and park attendance increases – and especially for the communities that do not. They are for groups seeking to build on prior efforts and for those groups who may be stalled or frustrated in their efforts (perhaps overwhelmed by what seem to be an endless number of tools and resources available). They will also orient and help prepare communities just starting their work.

At their most basic these resources:

1. Provide a guide to using and implementing the wide range of active living tools, projects and programs that put communities on the path toward fashioning themselves as Active Living environments;
2. Empower users with an understanding of how to engage in participatory democracy;
3. Empower users with an understanding of how to think through needs and desired results
4. Provide a step-by-step model for community engagement and action premised on the idea that if we can better help people understand and link the series of decisions and steps that are required to make change happen then more change will happen;
5. Identify how capitalizing on momentum can effect even more change.

The National Center for Bicycling & Walking invites you and your communities to use these resources as you work toward more walkable, bike-friendly, Active Living environments and a healthier, happier society. Put on your walking shoes, grab a bike helmet and join us!

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## Foreword

The National Center for Walking & Bicycling (NCBW), through its Active Living Resource Center (ALRC), conceived of a multi-staged approach to assist community advocates and others find and use the best available tools and programs to help them make their community more pedestrian and / or walk friendly – what we define more broadly as Active Living environments. The ALRC aims to support change in the way we plan, design, and manage our environments to create active, healthy communities. The work of the ALRC is informed by the programs and operations of the National Center for Bicycling & Walking. These projects are funded with a grant from The Robert Wood Johnson Foundation.

This multi-staged approach includes:

1. A catalog or “library” of community assessment tools, resources, and programs (*The NCBW / ALRC Environmental Scan*).
2. A logic model or “Roadmap” to using and implementing the wide range of tools, projects and programs reviewed in *The NCBW / ALRC Environmental Scan*. This document aids Planners, Coordinators, activists, advocates and others put communities on the path toward becoming Active Living environments. It guides these organizers through “think through” and framing exercises with community members, building community capacity along the way (*The NCBW / ALRC Roadmap for Active Community Implementation*).
3. A marketplace of several “micro” Roadmaps or planning guides applying *The NCBW / ALRC Roadmap for Active Community Implementation* to specific desired outcomes. These marketplace offerings are for community advocates working on, for example, efforts to improve safety and walk- and bike-to-school rates in school catchment areas for students and others for whom schools are a destination or other issues of their concern (*The NCBW / ALRC Active Community Schools Workbook*).

These materials are a work-in-progress. We are constantly updating and adding information to *The NCBW / ALRC Environmental Scan* (it has evolved to an interactive web-based document on the ALRC website). We are always seeking input from users regarding *The NCBW / ALRC Roadmap for Active Community Implementation*. Lastly we are working to identify community needs for micro Roadmaps and respond with additional marketplace tools

## The Need for these Resources

These materials reflect our synthesis of, and response to, findings from dozens of interviews and surveys of bicycle and pedestrian activists and organizers; reviews of projects, programs and associated materials related to bicycle-friendly, walkable, and active community initiatives; reviews of community assessments and evaluation tools; and analysis of “Active Living community” components. We refer to these activities our original “Environmental Scan.”

We also convened two focus groups to discuss our findings, and to identify policy and other barriers to successful implementation of walk, bike, Active Living and other active community initiatives. Participants in these focus groups included Bicycle and Pedestrian coordinators and Transportation officials, and representatives from the Public Health field, advocacy groups, academia, transportation planning, engineering and others.

Reviewing data from these sources we recognized a pattern of macro-level organizational barriers to successfully implementing bicycle, pedestrian and healthy community initiatives:

1. Need for tools that help navigate and make sense of the various resources available, linking them more directly to community purposes.
2. Need to rethink current models of engagement and outreach efforts to better connect to other disciplines, organizational partners, and to community groups, organizations and demographics not currently connected to.
3. Need for a model that helps Planners, Coordinators, organizers, activists, advocates and community partners think through engagement and planning activities and to prioritize next actions.
4. Need for planning beyond the plan at the outset of community projects in order to capitalize on momentum generated by community-based efforts to improving linkages to social movement frameworks and to other groups, projects, programs and efforts.
5. Need for a shift in perspective from disconnected community-based struggles to collective efforts that contribute to a larger movement for social change.

These barriers suggest that communities are largely flying solo as they feel their way through community organizing (often missing connections with key partners). They waste time attempting to interpret stacks of tools

and resources, and muddle through planning exercises. Few of the resources we reviewed address these barriers. Furthermore, we found few resources designed to support communities in their efforts to connect to state/regional or national support networks.

Our findings also prompted self reflection. What is missing from the NCBW's advocacy efforts and those of other national advocates for bicycle, pedestrian and Active Living efforts? How can we better assist communities as they attempt to realize their visions of healthier, more active environments? How can national organizations come together to advance a movement for more walkable, bikable and Active Communities?

We realized that although we work hard to effect positive change, as do other national bike, pedestrian and Active Living advocacy groups, we could barely see the forest of an emergent movement for change for the trees of our immediate concerns. We were missing connections with key partners (falling short when it came to consistently advancing democratic, participatory engagement) and missing opportunities to cultivate networks of support for our concerns. We were failing to link our efforts with other similar efforts to build momentum and contribute to a larger movement to social change. Us advocates, it seems, are more a *collection* of national organizations working toward a loose affiliation of similar goals rather than a *collective* of advocacy organizations working to support, encourage, and share resources with one another as we move to shape a broader movement for a walkable, bikable, active and healthy America.

The three documents that follow, *The NCBW / ALRC Environmental Scan*, *The NCBW / ALRC Roadmap for Active Community Implementation*, and *The NCBW / ALRC Active Community Schools Workbook* (an application of the larger *The NCBW / ALRC Roadmap* model to organizing around community schools) developed sequentially, and in response to the barriers identified (above). They represent one attempt to improve the accessibility of existing resources for community needs, and to move Bicycle, Pedestrian, and Active Living organizing one step further on the path toward social change.

## About the Tools and the Organization of Materials

### I. The NCBW / ALRC Environmental Scan

Communities looking to become more walkable and bike-friendly have a host of tools, projects and programs available to help them on the path toward their goals. Many communities aren't aware of these resources, while others are simply overwhelmed by the options and don't know where to start. *The NCBW / ALRC Environmental Scan* is a guide to these resources, suggesting their utility for different needs and user groups. It suggests a sequence for their use, categorizing the tools per the first six stages of *The NCBW / ALRC Roadmap for Active Community Implementation Part II Logic Model*.

For each tool profiled in *The NCBW / ALRC Environmental Scan* we provide basic access information, a summary of materials, and suggestions for use. Where possible we provide examples of best practice. For each "stage" of tools we define terms and distinguish between the various approaches to tool use.

### II. The NCBW / ALRC Roadmap for Active Community Implementation

*The NCBW / ALRC Roadmap* is designed to be a guide to using and implementing the wide range of active living tools, resources, projects and programs that put communities on the path toward fashioning themselves as active living environments. *The NCBW / ALRC Roadmap* responds to what bicycle and pedestrian activists and advocates around the country have identified as the need for tools that help navigate and make sense of the various resources available. It seeks to link these resources more directly to community purposes, building on *The NCBW / ALRC Environmental Scan*.

*The NCBW / ALRC Roadmap* helps create the architecture for a successful Active Community engagement campaign. It links bicycle, pedestrian and Active Living campaigns to social movement organizing (Part One); identifies community capacity resources necessary for a sturdy foundation (Part Two: Blueprints, Bricks and Mortar); details a seven stage process to shape projects and programs, keep them on track, and link efforts to broader movement goals (Part Three: The Logic Model); and suggests sources to help with the undertaking (Part Four: Resources and Tools).

Detailed worksheets that help users think through community goals and needs and help next steps are the organizing principle of *The NCBW / ALRC Roadmap*. The document aims to empower folks responsible for implementing and championing bicycle and pedestrian initiatives at local,



regional and state levels. It is designed for bicycle, pedestrian and Active Living Planners, Coordinators, advocates and other organizers as they go about their work of helping communities realize their visions.

### III. The Schools Application

*The NCBW / ALRC Active Community Schools Workbook* is a tool for communities, schools and others working to improve safety for bicyclists and pedestrians in school catchment areas and increasing walk-to-school and bike-to-school rates for students and others for whom community schools are a destination. A program for Active Community Schools could address one or more of the following five components: encouragement, access, controlling vehicular movements, site design or location. It could include a comprehensive Safe Routes to School (SRTS) Program or a city-wide commitment to locating new schools within walking or cycling distance of the community it serves. *The NCBW / ALRC Active Community Schools Workbook* supports users step-by-step as they think through and plan for all stages of schools-area program development and implementation for the component(s) they choose to address.

Following *The NCBW / ALRC Roadmap* model this document poses guiding questions, provides detailed worksheets and identifies external resources. *The NCBW / ALRC Active Community Schools Workbook* helps community groups link objectives with clearly defined actions, and aids them in identifying and communicating visions, deliverables and other activities that drive successful plan development and implementation.

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# The NCBW / ALRC Active Community Schools Workbook

*The NCBW / ALRC Active Community Schools Workbook* is a resource for communities, groups and schools to help identify and communicate visions and deliverables that support the goals of improving safety for bicyclists and pedestrians in school catchment areas, and increasing walk-to-school and bike-to-school rates for students and others for whom community schools are a destination. It is a framing document and planning workbook for Active Community Schools initiatives, designed to help communities, groups and schools think through those activities that drive successful plan development and implementation.

## How does The NCBW / ALRC Active Community Schools Workbook Work?

*The NCBW / ALRC Active Community Schools Workbook* prioritizes engaging multiple and diverse stakeholders, consensus formation, and reasoned action. By posing guiding questions, linking objectives with clearly defined actions and identifying external resources, *The NCBW / ALRC Active Community Schools Workbook* supports users step-by-step as they move through the following six stages:

Stage 1. *All On Board* (Community building and advocacy)

Stage 2. *Charting the Course* (Get organized)

Stage 3. *Lay of the Land* (Data needs and assessments)

Stage 4. *Daytrips* (Project development)

Stage 5. *Long Hauls* (Program development)

Stage 6. *Travelogue* (Process and outcome evaluations)

This multi-staged approach mirrors the more comprehensive *NCBW / ALRC Roadmap for Active Community Implementation* designed to help Planners, Coordinators, Advocates, Organizers and others think through and plan for community engagement around bicycle, pedestrian and Active Living initiatives. Both documents build on the *NCBW / ALRC Environmental Scan*, a catalog and summary of the wide range of active

living tools, resources, projects and programs that help increase the number of people walking and bicycling. *The NCBW / ALRC Roadmap for Active Community Implementation* serves as a guide to tool use and implementation in an organizing context and using a seven stage model. The *NCBW / ALRC Active Community Schools Workbook* applies the first six stages of *The NCBW / ALRC Roadmap* model solely to school-area issues.

### **What The NCBW / ALRC Active Community Schools Workbook is not**

This Workbook does not detail an Active Community Schools or Safe Routes to School (SRTS) Plan. A detailed Active Community Schools or SRTS Plan should be unique to the individual school/community based on characteristics including layout, geography and weather, area demographics, and community behavior and desires. A detailed Active Community Schools or SRTS Plan should also reflect the input and perspectives of many stakeholders. *The NCBW / ALRC Active Community Schools Workbook* puts users on the path to developing an Active Community Schools or SRTS Plan that is unique to each community's needs and reflects varied perspectives. The Workbook is not the plan itself.

### **What can The NCBW / ALRC Active Community Schools Workbook do for you?**

Many communities, groups and schools are working to improve school area safety and increase walk-to-school and bike-to-school rates. Some of these communities are overwhelmed by the wealth of resources available to them. Many simply don't know where to start. *The NCBW / ALRC Active Community Schools Workbook* can help on both fronts. It simplifies the process of Schools-Area planning and plan development by helping users think through their needs and goals. It also provides a catalog of resources appropriate for each stage. Perhaps most importantly, however, it helps users articulate their visions, linking them to strategies and action steps as they work to gain support for Active Community Schools and SRTS planning activities.

## About the Worksheets

Worksheets are provided to assist in the planning of Active Community Schools initiatives. These worksheets will be useful framing tools regardless the size and complexity of the initiative. The worksheets are organized sequentially moving through the six stages described above.

Many of the community engagement worksheets are divided into two sections: framing questions and driving questions. It is suggested that before you begin to fill in the worksheets you read through them, looking specifically at the framing questions to develop an overview of the scope of the undertaking. The driving questions will assist in identifying the details of the schools-area community engagement plan.

## Community Building

Partnering for healthy schools and communities is imperative. Before you begin, determine who to bring to the table to vision, plan, champion, share resources and help bring about the change you desire. Partnership members could include: students, parents, teachers, school officials, school boards, Parent-Teacher Associations, philanthropic organizations, media, local government, local transportation agencies, local bicycle or pedestrian advocates, law enforcement agencies, a local health agency or recognized health organization, local civic associations, and neighboring residents.

The community building process aims to identify and strengthen ties among partners and assist them in working individually and collectively toward change. Community building encompasses a number of dimensions, including: participation; capacity building; governance; collaboration; social capital development; and strengthening civic practices.

A Community Capacity Assessment is a good place to start in identifying who to bring to the table to affect change. A Community Capacity Assessment also helps to identify and measure various dimensions of community activity and resources including: participation, leadership, skills and knowledge, social and interagency networks, sense of community, community history, community structures, community values, and critical reflection. Work through the Community Capacity Checklist (Worksheet 1.1) to develop an understanding of your bicycle and pedestrian environment and to identify assets, resources and partners.

## 1.1 – Community Capacity Checklist

### Community demographic profile

- √ Population, education, income, race, ethnicity, age, gender
- √ Community maps of schools, parks and recreation facilities
- √ Tourism, industry, economic and labor force data
- √ Latest status of local overweight, obesity and diabetes rates
- √ Latest statistics of traffic conflicts including cyclists / pedestrians

### Community health advocacy

- √ Hospitals, doctors, dentists, clinics, public health community
- √ History of health risk issue awareness efforts

### Community bicycle /pedestrian advocacy

- √ Bicycle / walking clubs
- √ Bicycle / pedestrian planners, engineers or consultants
- √ Engagement in iWALK (or similar) activities
- √ Engagement in Safe Routes to Schools activities

### Local policies and process

- √ Local bicycle / pedestrian-related laws and public policies
- √ Local enforcement, compliance and regulation record
- √ How local laws get passed, timeline
- √ Referendum analysis

### Local politics and elected officials

- √ Assessment/bios of Mayor, city council, and city staff
- √ Assessment/bios of other elected officials (county/state-level)
- √ Potential champions among council and staff
- √ Political trends: voting history, political boundaries, election cycle
- √ Review of current and pertinent city/county issues

### Media and communications

- √ Newspapers, radio, tv/cable, web-sites
- √ Editorial pages
- √ Community organization updates, publications or newsletters

### Community support and polling

- √ Existing vision(s) for active living, healthy communities approach
- √ Recently conducted community polls or surveys
- √ Worksite surveys and community-wide polling
- √ Related indicators of support for active living programs



## WORKSHEET 1.2 – Identify the Approach to Engaging Partners

| Framing Questions  | Notes |
|--|-------|
| Does the issue directly affect quality of life of residents (health, safety, environment, recreational issues)?  |       |
| Are legal or administrative elements a consideration?  |       |
| Might the issue have long-term, large-scale or otherwise significant social, environmental, and/or economics impacts for stakeholder groups?   |       |
| Driving Questions  | Notes |
| <p>What specific information are you seeking from partners?</p> <p><b>Inform:</b> To provide them with balanced and objective information to assist them in understanding the problem, alternatives, and/or solutions.</p> <p><b>Consult:</b> To obtain feedback on analysis, alternatives and/or decisions</p> <p><b>Involve:</b> To work directly with partners throughout the process to ensure issues and concerns are consistently understood and considered.</p> |       |
| What other principles, values or commitments need to be considered?  |       |

## WORKSHEET 1.3 – Identifying Partners and Stakeholders

Organizing for change can be overwhelming. Partnering with a broad range of constituencies that acknowledge a common goal and make a commitment to collaboration builds confidence, lessens the burden on any one partner, and makes the task less daunting.

| Framing Questions   |   | Notes                                  |                            |
|---|---|--|----------------------------|
| What are the geographic boundary / catchment area for walking and bicycling to your school? |   |  |                            |
| Based on the geographic boundary, who specifically might want to be involved?               |   |  |                            |
| Who needs to be involved outside this geographic boundary?                                  |   |  |                            |
| Does anyone need to be involved from municipal government?                                  |   |  |                            |
| Driving Questions   |   |  |                            |
| Stakeholder Group   | What issues are of concern to this group? | What information do they need from us? | What do we need from them? |
| Internal Stakeholders   |   |  |                            |
| External Stakeholders   |   |  |                            |

## WORKSHEET 1.4 – Identify Tools / Resources for Partner Engagement

This will help determine the appropriate tools and resources to engage the appropriate stakeholder groups.

| Stakeholder Group | Size of Group | Question Being Asked | Suggested Tool |
|-------------------|---------------|----------------------|----------------|
| Internal          |               |                      |                |
|                   |               |                      |                |
|                   |               |                      |                |
|                   |               |                      |                |
|                   |               |                      |                |
|                   |               |                      |                |
|                   |               |                      |                |
| External          |               |                      |                |
|                   |               |                      |                |
|                   |               |                      |                |
|                   |               |                      |                |
|                   |               |                      |                |
|                   |               |                      |                |
|                   |               |                      |                |

See *The NCBW / ALRC Roadmap for Active Community Implementation Part Three “Tools and Resources”* and *The NCBW / ALRC Environmental Scan “Stage One Tools”* for Community Building and Advocacy Tool suggestions.

# Advocacy

Advocacy focuses on the means, resources and activities that individuals and groups use for bringing attention to a particular issue, gathering partners, and connecting with identifying stakeholders and their needs. This can include position papers, research, coalition building, public education and awareness campaigns, media, meetings (including ones with the decision-makers) and many other forms of outreach and engagement.

## WORKSHEET 1.5 – Planning the Engagement Strategy

| Framing Questions  | Notes |  |
|--|-------|--|
| What message(s) do we want to communicate?   |       |  |
| Who are the audiences?   |       |  |
| Driving Questions  | Notes |  |
| What are the appropriate communication channels and media?   |       |  |
| Which types of media should we utilize? (school newsletters, e-mails, face-to-face meetings, presentations, bulletin boards, in-school events) |       |  |
| Who will be assigned communication roles and responsibilities?   |       |  |
| What is the activity plan to reach each target audience?   |       |  |
| What feedback collection mechanisms (e.g. voicemail, mail, e-mail) will be used?   |       |  |
| How will we evaluate communication effectiveness?  |       |  |

## Get Organized

Partners need to shape a shared vision of what they want to achieve. This does not have to be a physical thing, like stoplights at intersections or striped bike lanes, it can be a new policy, a revised set of attitudes, an increase in awareness, a change in habits, a new organizational structure or any shared goal that means or implies an improvement for the target group or the community as a whole.

Goals and objectives should be identified in all project and planning documents. Goals and objectives should also be set forth to guide partner engagement and planning activities. They should be chosen, understood, and agreed upon by all partners. The question “where do we want to go” must be answered by the community as a whole, not just by the organizing entity, not just by the principal, not just by the school board, not just by the area residents, not just by the students, but by all interested members of the community.

A good place to start is in identifying the main problem to be solved. Considering the following statistics from The Center for Disease Control and Prevention (CDC) might help partners begin to dissect, and help frame, the nature of concern:

In 2002 the CDC analyzed data from the national HealthStyles Survey, an annual mail survey of health-related attitudes and behaviors in the United States, to examine why the majority of children do not walk or bike to school. Reported barriers to walking and biking to school include long distances (55%), traffic danger (40%), adverse weather conditions (24%), crime danger (18%), opposing school policy (7%), and various other reasons (25%). Sixteen percent of respondents reported no barriers to their children walking or biking to school. Not surprisingly, no-barriers children are six times more likely to walk or bike to school as compared to the rest of the reporting group with one or more barriers.

## WORKSHEET 2.1 – Identify the problem

| Framing Questions  | Notes |
|--|-------|
| What walk / bike barriers exist for your school and community?                           |       |
| Which barrier is most significant in terms of preventing walking / bicycling?            |       |
| Driving Questions  | Notes |
| Do you need to gather data to support the understanding of the situation?                |       |
| Which of these barriers do you think you can address? Which do you most want to address? |       |
| What resources do you need to help bring about change?                                   |       |

## WORKSHEET 2.2 – Establishing the vision, mission and approach

Start the collaboration process by bringing all partners to the table with the goal of identifying a common vision, mission and approach. Doing so at the outset of the effort will clarify expectations and better enable partners to overcome setbacks along the way.

An Example of a Healthy Community School Vision Statement:  
 “Ideally healthy community schools are of moderate size and are located in the neighborhood they serve. Most children walk or bike to school. School sites and facilities serve a wide range of the community’s services and needs.”

| Framing Questions  | Notes |
|--|-------|
| Do partners have different views on the policies and barriers that block change?   |       |
| Are all partners committed to the hard work of removing walk / bike barriers? (Why or why not?)  |       |
| Are partners willing to work with different perspectives, values and priorities?   |       |
| Driving Questions  |       |
| What will you focus on and why?<br><br>Location?<br><br>Access?<br><br>Site Design?<br><br>Controlling vehicular movement?<br><br>Encouragement?<br><br>Policy Change?<br><br>Other? |       |





## WORKSHEET 2.4 – Gauging progress, celebrating success

Progress should be measured both in terms of outcome and process. Outcome measures look at the success of the initiative relative to the aim. Process measures examine the nature of engagement among partners. Benchmarks and procedures for evaluating both should be determined by all partners.

| Framing Questions                                   |  | Notes                                |   |
|---|--|--------------------------------------|---|
| How can we hold ourselves accountable to our goals? |  |                                      |   |
| Driving Questions                                   |  |                                      |   |
| What are our process goals?                         | How will we know if we've met our process goals? | What are our outcome / impact goals? | How will we know if we've met our outcome / impact goals? |
|   |  |                                      |   |
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|   |  |                                      |   |

## Data Collection

Before you can increase the rates of walking and bicycling to school, you need to collect information about the physical aspects of a walk/bike-to-school environment. Community Assessments and similar tools can generate awareness, engage diverse partners (especially youth) and stimulate organizing on the issues. The information gathered often serves as a springboard for the case for change. There are three broad categories of assessments which include community checklists / audits / scoring devices; Health Impact Assessments; and Project Specific Assessments.

### Community checklists / audits / scoring devices

Community checklists, audits and other scoring devices bring order to decision making and data gathering processes. They are often excellent tools for generating awareness about the issues. They can also serve as guides to an ideal in that they detail community characteristics as a reminder of desired content and form.

Community checklists, audits and other scoring devices bring order to decision making and data gathering processes. These measurement devices can be divided into two categories: 1) those that are guides to an ideal and that detail community characteristics as a reminder of desired content and form; and 2) those that attempt to quantitatively evaluate these qualities so as to facilitate the comparison of one community to another.

It is important to understand that rarely are such these types of measurements ends unto themselves but are most often guides to action. Assessments should be undertaken judiciously. Those conducted without prior identified resources available to act on findings, or assessments for which there is no commitment to act after their completion, will likely only serve to demoralize those engaged in the process.

## Health Impact Assessments (HIAs)

*Health Impact Assessments* (HIAs) are a combination of procedures, methods and tools by which a policy, program or project may be judged as to its potential effects on the health of a population, and the distribution of those effects within the population. In the context of walking, bicycling and healthy communities HIAs serve to help public health, planning, and transportation officials better appreciate the impact of land-use and transportation planning decisions on public health and equity and environmental justice concerns. Designed specific to the policy, program or project being evaluated, they are often time and labor-intensive.

Active Community School initiatives can be composed of any number of components, including but not limited to: education (safety education in classrooms), enforcement (police enforcement of speed limit around schools), engineering (traffic calming, building sidewalks), dedicated resources (walking school busses), and school policy changes. Using the HIA methodology these components estimate proximal (increased safety) and intermediate outcomes (more children walking to school) which can then be used to estimate health outcomes (obesity, bone density, etc.).

## Project Specific Assessments

Project/Program Specific Assessments are tools that help decision makers, municipal planners and staff, neighborhood organizations, advocacy coalitions and others determine whether or not a specific project or effort is fulfilling community goals. They are more comprehensive, thorough, and technical than community checklists, audits and other scoring devices. They are also outcome- and responsibility-linked, structured as to be responsive to multiple priorities. Such assessments can also be used as quality-learning tools, and can help communities begin to use concepts that add to positive discussions about their active community goals.

In the case of both the League of American Bicyclists' prestigious *Bicycle Friendly Communities* Program and The European *BYPAD (Bicycle Policy Audit)* included as resources in *Resources Stage Five: Program Development*, the concept-positive assessments are rigorous and thorough enough as to provide prescriptive guidelines for comprehensive program implementation.

## WORKSHEET 3.1 – Identifying data needs

| Framing Questions   | Notes |
|---|-------|
| Do you need to generate popular interest in the initiative?                     |       |
| Do you need to convince decision makers of the need for change?                 |       |
| Do you need to convince decision makers that the initiative will effect change? |       |
| Will data better position you in grant seeking activities?                      |       |
| Are you seeking to assess prior initiatives?                                    |       |
| Are health agencies involved and active participants?                           |       |





## Projects and Project Development

Active School Environment projects are temporary endeavors undertaken to create a unique product, service or result. The types of projects a community or partners group might engage in will likely not extend to large scale changes in infrastructure, but will focus on plans, policies and / or services. These activities involve the application of knowledge, skills, tools, techniques, and sometimes significant organizing efforts to activities in order to meet stated goals and expectations. They are often technical in nature, and have a defined beginning and end. Project goals go beyond the obvious realization of project success – they build capacity through partner engagement and leadership training, cultivate expertise, build confidence and serve as a training ground for Stage V: Long Hauls.

There are three primary categories of projects: plans, policies and services. Projects can include the creation of a Pedestrian Safety Action Plan, or a policy for pedestrian-friendly intersection design. They can also include service provision, for example a walking school bus or development of a map of pedestrian and bicycle friendly routes to school.

### Service Provision

For many communities, organizing a service-oriented effort like an International Walk to School Day event, a walking school bus, a community-wide audit event, or mapping pedestrian and bicycle friendly routes to schools is the springboard for long term, comprehensive initiatives. Events are fun ways of generating awareness about the issues, and afford roles for many different community partners including schoolchildren, police, school principals, councilpersons and others. Events can be used to launch or announce plan or policy development efforts.

### Plans

Sustained change is most often the result of a good plan. Depending on long term goals, partners may wish to spend considerable effort at this stage developing comprehensive Pedestrian Safety or Healthy Communities Plans to use as a framework for program development and

implementation. Other smaller scale plans, for example a school-area bicycle and pedestrian safety plan, a greenways plan, or similar are also good places to start.

## **Policies**

Policies supportive of bicycling, walking, and healthy communities recommend and detail a commitment to developing a transportation infrastructure that is safe, convenient, accessible, and attractive to bicyclists and pedestrians. Policies typically detail actions to implement and provide guidance on the planning, design, operation, and maintenance of facilities for bicyclists and pedestrians. Policies differ from Plans in that once adopted they are enforceable.

## **Understanding Project Development**

Project development involves scripting action steps, considering project impacts one, five, and ten years down the road (or more), engaging diverse partners and evaluating the strengths and weaknesses of partners, agreement on goals and rules of engagement, and establishing process and outcome measures. In short, project development creates the infrastructure for success. This Active Community Schools Workbook is an example of how to develop a project plan.

Planning for a good project typically includes consideration of the following seven elements:

1. Prepare for action
2. Build partnerships
3. Establish a common vision, mission and approach
4. Determine who will provide oversight / coordination
5. Establish a decision making process
6. Identify data needs
7. Gauge progress, celebrate successes

Project development can be accomplished through workshops, charrettes, community meetings, or similar in-person gatherings or, increasingly, via electronic exchanges like webinars or wikiplan sharing.



## WORKSHEET 4.1 – Project Planning

| Framing Questions  | Notes |
|--|-------|
| Are you developing a plan, shaping a policy, or providing a service?                   |       |
| How does your project relate to partner goals?   |       |
| Driving Questions  | Notes |
| Is training needed to see the project through?   |       |
| What resources are needed?   |       |
| Might historical factors or previous decisions affect how this project is implemented? |       |
| Who will be involved?  |       |
| Who needs to be involved?  |       |
| What is the time frame for the project?  |       |
| How will you measure success?  |       |

## WORKSHEET 4.2 – Project Definition

This worksheet will help define the scope of your project and key events linked to timelines

| Framing Questions   | Notes |
|---|-------|
| What is the scope of this project?  |       |
| What are the project timelines?   |       |
| What are the project milestones? (key events)   |       |
| Driving Questions   | Notes |
| What is the scope of this project? (school area, neighborhood, district, city-wide)   |       |
| What are the key decision points?   |       |
| When will partner input be sought?  |       |
| When will stakeholder input be sought?  |       |
| Are reports or other notifications required by governing bodies? When?  |       |
| Might this effort impact: <ul style="list-style-type: none"> <li>• Other area decisions / projects</li> <li>• Specific communities</li> <li>• Businesses</li> <li>• Individuals</li> <li>• Environment</li> <li>• Other?</li> </ul> |       |

## Programs and Program Development

If managing a project is like flying an aircraft, then managing a program is like running an airport. Projects, like aircraft, come in all sizes: big and small. Depending on size you may have more (or less) partners and resources onboard to help you with the flight. Programs are more like airports, with aircraft (projects) taking off and landing all the time. Well functioning programs reflect hard work, vision, planning, and sustained commitment on the part of all partners.

Programs have several distinct characteristics:

- They are typically longer in duration than projects and can be ongoing
- They focus on deliverables with a strategic intent
- They are often geared toward making a significant and lasting change in a community's structure, processes, organization or community member's way of thinking
- They aim to deliver benefits throughout program duration

## **Types of Active Community Schools Efforts**

A program for Active Community Schools typically addresses one or more of the following five components: encouragement, access, controlling vehicular movements, site design and location. It could include a comprehensive Safe Routes to School (SRTS) Program or a city-wide commitment to locating new schools within walking or cycling distance of the community it serves. What follows details sample objectives and associated actions for these five components. The worksheets are designed to help define the scope of the program and key events linked to timelines.

## **Understanding Program Development**

Like project development, program development involves scripting action steps, considering project impacts one, five, and ten years down the road (or more), engaging diverse partners and evaluating the strengths and weaknesses of partners, agreement on goals and rules of engagement, and establishing process and outcome measures.

## WORKSHEET 5.1 – Program Planning

| Framing Questions  | Notes |
|--|-------|
| What will you focus on and why?<br><br>Encouragement?<br><br>Access?<br><br>Controlling cars?<br><br>Site design?<br><br>Location?<br><br>Other? |       |
| How does your program relate to partner goals?   |       |
| Driving Questions  | Notes |
| Is training needed to see the project through?   |       |
| What resources are needed?   |       |
| Might historical factors or previous decisions affect how this project is implemented?   |       |
| Who will be involved?  |       |
| Who needs to be involved?  |       |
| What is the time frame for the project?  |       |

## WORKSHEET 5.2 – Program Definition

| Framing Questions   | Notes |
|---|-------|
| What is the scope of this program?  |       |
| What are the program milestones? (key events)   |       |
| Driving Questions   | Notes |
| What is the scope of this program? (school area, neighborhood, district, city-wide)   |       |
| What are the key decision points?   |       |
| When will partner input be sought?  |       |
| When will stakeholder input be sought?  |       |
| Are reports or other notifications required by governing bodies? When?  |       |
| Might this effort impact: <ul style="list-style-type: none"> <li>• Other area decisions / projects</li> <li>• Specific communities</li> <li>• Businesses</li> <li>• Individuals</li> <li>• Environment</li> <li>• Other?</li> </ul> |       |

## WORKSHEET 5.3 - Encouragement

Objective: To encourage school users (children, teachers, staff, and community members/school users) to walk and bike to school.

| Driving Questions  | Notes |
|--|-------|
| Does your community use schools as community centers?  |       |
| Is the school a community center?  |       |
| Is the school a voting center?   |       |
| Do the State Department of Education and the local school board have transportation policies that encourage bicycling and walking? |       |
| What percentage of school users bicycle or walk to school, at least some of the time?  |       |
| Is bicycle and pedestrian safety training a part of the curriculum?  |       |
| What percentage of schools and students take part in iWalk (International Walk to School Day)?                                     |       |
| What is the typical weight of school books a student is required to carry to and from school?                                      |       |

## WORKSHEET 5.3 – Encouragement, cont.

| Action Items   | Interest? (Y/N) | 0-3 years | 5+ years | Notes |
|--|-----------------|-----------|----------|-------|
| Encourage community center users to walk / bike to the school                          |                 |           |          |       |
| Revise school transportation policies prioritizing bike/walk over bus transport        |                 |           |          |       |
| Provide after-school transport if activities carry on after dark                       |                 |           |          |       |
| Provide bicycle / pedestrian safety training as part of the curriculum                 |                 |           |          |       |
| Promote walking by implementing iWALK and walking school bus activities                |                 |           |          |       |
| Reduce the number and size of books that children are required to carry to/from school |                 |           |          |       |
| Other?   |                 |           |          |       |



## WORKSHEET 5.4 - Access

Objective: To make it easy and safe for school users to walk to the school.

| Driving Questions   |                 | Notes     |          |       |
|---|-----------------|-----------|----------|-------|
| What percentage of the school user group can access the school on well-connected sidewalks?                       |                 |           |          |       |
| What percentage of children attending the school are bused short distances to avoid hazardous routes?             |                 |           |          |       |
| Has a Safe Routes to School (SRTS) Program been implemented   |                 |           |          |       |
| Action Items  | Interest? (Y/N) | 0-3 years | 5+ years | Notes |
| Connect school to the neighborhoods it serves with sidewalks, safe street crossings, and bicycle-friendly streets |                 |           |          |       |
| Implement SRTS Programs to ensure good bicycle and pedestrian access to schools                                   |                 |           |          |       |
| Other?  |                 |           |          |       |

## WORKSHEET 5.5 – Controlling Vehicular Access

Objective: To strictly control the operation of motor vehicles on and near school sites, at bus stops and along school routes.

| Driving Questions  |                 | Notes     |          |       |
|--|-----------------|-----------|----------|-------|
| Are there traffic calming treatments in the school area?   |                 |           |          |       |
| Does the school have routine local area traffic enforcement?   |                 |           |          |       |
| What is the average speed of motor vehicles on key roads and routes around the school?                                 |                 |           |          |       |
| Action Items   | Interest? (Y/N) | 0-3 years | 5+ years | Notes |
| Use traffic-calming techniques and other forms of street-design to limit motor vehicle speeds near school              |                 |           |          |       |
| Implement aggressive traffic enforcement to control motor vehicle speeds on streets used to walk to and from bus stops |                 |           |          |       |
| Create “car free zones” around elementary schools where only local traffic is permitted during school hours            |                 |           |          |       |
| Other?   |                 |           |          |       |

## WORKSHEET 5.6 – Site Design

Objective: Design, develop and retrofit bicycle- and pedestrian-oriented school sites.

| Driving Questions  |                 | Notes     |          |       |
|--|-----------------|-----------|----------|-------|
| Does the school meet accessibility standards?  |                 |           |          |       |
| Does the school have good bicycle parking?   |                 |           |          |       |
| Does the school's site design separate arriving buses and motor vehicles from arriving bicyclists and pedestrians? |                 |           |          |       |
| Action Items   | Interest? (Y/N) | 0-3 years | 5+ years | Notes |
| Make all school entrances directly accessible by pedestrians   |                 |           |          |       |
| Make school directly accessible from the surrounding neighborhood  |                 |           |          |       |
| Provide good bicycle parking at school in a safe, secure, and convenient location                                  |                 |           |          |       |
| Plan school bus routes and pick-up points to minimize conflicts with pedestrians and bicyclists                    |                 |           |          |       |
| Minimize parking facilities, locate parking so as to minimize conflicts with pedestrians and bicyclists            |                 |           |          |       |
| Other?   |                 |           |          |       |

## WORKSHEET 5.7 – Location

Objective: Locate schools in walking distance of all community users. If this is not feasible, locate elementary schools within walking distance of the student population and middle and high schools within bicycling distance of the community.

| Driving Questions  |                 | Notes     |          |       |
|--|-----------------|-----------|----------|-------|
| Do state and local governments or school boards have policies favoring neighborhood schools?                   |                 |           |          |       |
| What is the average length of the school trip for students in elementary and middle schools? For high schools? |                 |           |          |       |
| What percentage of the population lives within walking or bicycling distance of the school?                    |                 |           |          |       |
| Action Items   | Interest? (Y/N) | 0-3 years | 5+ years | Notes |
| Institute policies to locate school sites in neighborhoods they are expected to serve                          |                 |           |          |       |
| Relax site standards to allow smaller schools / grounds compatible with neighborhoods                          |                 |           |          |       |
| Increase public and public health agency involvement in selection of school sites                              |                 |           |          |       |
| Give preference to rehabilitating existing neighborhood schools  |                 |           |          |       |
| Site school in neighborhoods, away from high-speed, high-volume streets and highways                           |                 |           |          |       |
| Other?   |                 |           |          |       |

## Evaluations

Evaluations fall into one of two categories, Impact Evaluations (often called Project or Program Evaluations) and Process Evaluations. For bicycle, pedestrian, and healthy living initiatives, both Impact and Process Evaluation methodology borrows heavily from the Public Health and Health Intervention literature. Impact Evaluation examines how effective a particular intervention, project or program was in meeting goals. Given that this will vary from one effort and be dependent on data specific to the community, we do not provide guidance in Impact Evaluation. Process Evaluation looks at engagement strategies through project/program development and implementation, and is frequently tied to equity and Environmental Justice concerns.

Process Evaluation focuses on the nature of participant engagement and decision making. Process Evaluation asks “is the decision making process democratic? Are all partners included? Do all partners feel valued?” There are multiple approaches to evaluating participant engagement. These include participant surveys, event or activity logs, key informant interviews, focus groups, Marketing Effectiveness Inventories (MEIs), and reviews of meeting documents.

## WORKSHEET 6.1 – Community Engagement Evaluation Strategy

| Framing Questions   | Notes |
|---|-------|
| What are the indicators of success for partner engagement?                    |       |
| What factors do you want to include in the evaluation process?                |       |
| How will the evaluation process inform ongoing and future partner activities? |       |
| Driving Questions   | Notes |
| Who will be consulted for evaluation feedback?                                |       |
| What methods will be used? (e.g. survey, questionnaire)                       |       |
| Is interim evaluation required?   |       |
| How will evaluation results be communicated?                                  |       |
| Will formal reports need to be written and distributed? If so, to whom?       |       |
| How will information be stored, recorded and tracked?                         |       |

# Resources

What follows are a limited number of resources to get you started on each Stage. Please see the National Center for Bicycling & Walking “Environmental Scan” for more resources and descriptions.

## Stage One Resources

**State Departments of Education:** The U.S. Department of Education provides contacts and information for schools in all U.S. states, commonwealths and territories.

<http://www.ed.gov/about/contacts/state/index.html>

**National School Board Association:** The National School Board Association’s “School Health Programs Department” helps school policymakers and educators make informed decisions about health issues affecting the academic achievement and healthy development of students. The NSBA website also provides contact information for local school boards.

<http://www.nsba.org/MainMenu/SchoolHealth.aspx>

**National Parent-Teacher Association:** The National PTA website includes information on individual state level contacts and conferences. The National PTA has developed *PTA Healthy Lifestyles: A Parent’s Guide*, which contains information on nutrition, physical activity, and healthy school communities.

[http://www.pta.org/healthy\\_lifestyles.asp](http://www.pta.org/healthy_lifestyles.asp)

## Stage Two Resources

**National Clearinghouse for Educational Facilities:** News, reports, and resources on school facility planning.

[www.edfacilities.org](http://www.edfacilities.org)

**Coalition for Community Schools:** Works to make schools the center of community. Website includes resources and organizational reports.

[www.communityschools.org](http://www.communityschools.org)

**NCBW Safe Routes to School:** The National Center for Bicycling & Walking maintains a web portal to Safe Routes to School resources.

[www.bikewalk.org/safe\\_routes\\_to\\_school/SR2S\\_introduction.htm](http://www.bikewalk.org/safe_routes_to_school/SR2S_introduction.htm)

**National Highway Traffic Safety Administration:** *Safe Routes to School: Practice and Promise* document articulates the benefits of SRTS program development.

<http://www.nhtsa.dot.gov/people/injury/pedbimot/bike/Safe-Routes-2004/index.html>

### Stage Three Resources

**Neighborhood Walkability Checklist (PBIC):** This checklist begins: “how walkable is your community? Take a walk with a child and decide for yourselves.” It is comprised of five simple questions that help with a cursory rating of the walk environment. It is geared to children and their guardians or teachers.

<http://tinyurl.com/cljvq9>

**Smart Growth Toolkit (EPA):** The tools include 1) a “quick diagnostic” that helps identify data needs; 2) a policy audit of land use and development policies; 3) a code and zoning audit; 4) an audit summary worksheet that assists with project and program prioritization; 5) a project scorecard for evaluation of proposed development projects; 6) an incentives matrix; and 7) a strategy builder.

<http://www.smartgrowthtoolkit.net/>

**WalkScore (Front Seat Software):** *WalkScore* is most frequently used by realtors to score neighborhoods, ranking neighborhood “walkability” based on proximity to selected destination types. *WalkScore* is best used to help people find walkable communities in which to live.

[www.walkscore.com](http://www.walkscore.com)



**Healthy Development Measurement Tool (San Francisco Department of Public Health):** The *HDMT* uses Health Impact Assessment (HIA) methods, checklists and worksheets to guide communities in assessing urban environmental conditions and responding to health inequities and environmental policy gaps. It explicitly connects public health to urban development planning.

<http://www.thehdm.org/>

**UCLA Health Impact Assessment (HIA) Methodology:** While every program requires a uniquely formulated HIA, UCLA's HIA methodology has been successfully applied to estimate the potential health effects of Walk to School programs around the country.

<http://www.ph.ucla.edu/hs/health-impact/>

**The State of California's Department of Healthcare Services** runs a model *Communities of Excellence in Nutrition, Physical Activity and Obesity Prevention (CX3)* pilot program. As part of this program they developed healthy community indicators in three categories: nutrition, physical activity and community assets.

<http://www.ca5aday.com/cx3/>

## Stage Four Resources

**iWalk:** The website of International Walk to School offers information and resources and other organizing materials to help schools initiative an annual Walk-to-School Day event.

<http://www.iwalktoschool.org>

**How to Organize a Walking/Cycling School Bus (Go-for-Green):** Although ten years old, this document out of Canada provides a comprehensive overview and step-by-step instructions for implementing a Walking or Cycling School Bus.

<http://tinyurl.com/cjsz6b>

**Active Community Workshops (NCBW):** These workshops, designed to assist communities draft an "Active Communities Action Plan," are premised on the idea that transportation planning decisions should be collaborative ventures made at the local level with multiple and diverse stakeholders.

<http://www.bikewalk.org/workshops.php>

**The ABCs of MTC (Bay Area MTC):** This document is useful for those in the planning stages of project and program development. It suggests funding sources and funding streams, identifies funding schedules, articulates hierarchy, and clarifies decision making for regional transportation efforts.

[http://www.mtc.ca.gov/library/abcs\\_of\\_mtc/](http://www.mtc.ca.gov/library/abcs_of_mtc/)

**Creating Bicycle Friendly and Walkable Communities: A Plan for Active Community Environments (NCBW):** This document surveys challenges to creating more active communities, identifies trends, and suggests objectives in five major areas of activity around which communities can organize to increase their walkability.

<http://www.bikewalk.org>

**The Pedestrian and Bicyclists' Information Center**

<http://www.bicyclinginfo.org/develop/policies.cfm>

**The U.S. Department of Transportation** developed a policy statement *Design Guidance Accommodating Pedestrian and Bicycle Travel: A Recommended Approach* that many states and communities have used as a model of commitment to integrating walking and bicycling into the American lifestyle.

<http://www.fhwa.dot.gov/environment/bikeped/design.htm>

**Complete the Streets** has developed guidelines to developing a *Complete Streets* policy including elements of a good policy and appropriate language.

<http://www.completestreets.org/howtogetto.html>

## Stage Five Resources

**The League of American Bicyclists** supports competitions toward the prestigious *Bicycle Friendly Community* designation. Communities that apply for Bicycle Friendly Community status must conduct a rigorous evaluation process.

<http://www.bikeleague.org/programs/bicyclefriendlyamerica/>

**The European Commission STEER Program** has developed the *Bicycle Policy Audit (BYPAD)* which forwards the idea of a “quality chain” of 9 modules which, in concert, should ensure a balanced cycling policy. It is applied throughout the European Union.

[http://www.bypad.org/cms\\_site.phtml?id=552&sprache=en](http://www.bypad.org/cms_site.phtml?id=552&sprache=en)

## Stage Six Resources

**Meeting Effectiveness Inventory Tool (Center for Pediatric Research):** This tool was developed for the process evaluation of community participation in health promotions activities.

<http://tinyurl.com/cxvldp>

**The Community Participation Evaluation Tool (South Australian Community Health Research Unit):** This document suggests ways of evaluating the processes and outcomes of community participation.

<http://tinyurl.com/d3cejp>