
Active Living by Design

Building and Sustaining a National Program

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Background

Philanthropic organizations have long emphasized the importance of impact in grantmaking activities. They use a variety of strategies to ensure sustainability after their funding ends. During the pre-award period, foundations may identify prospective grantees based on their track records of success; conduct careful legal and financial due diligence to minimize risk; and require a commitment of matching funding from the lead agency or other partners. Once funding begins, they may help bolster organizational effectiveness and leadership capacity with technical assistance, professional development activities, and other opportunities for learning and networking. Supporting the development of business plans to identify how initiatives will be maintained once funding ends, awarding bridge grants, and evaluating and disseminating best practices are additional ways that grantmakers can encourage long-term sustainability without investing in an initiative in perpetuity.

The Robert Wood Johnson Foundation's (RWJF; Foundation) Active Living by Design (ALbD) program offers an interesting example of how one national initiative has evolved. This commentary focuses on program sustainability from the perspective of the ALbD national program office (NPO). Additional articles¹⁻¹⁵ presented in this supplement to the *American Journal of Preventive Medicine* address program sustainability from the perspective of the ALbD community partnerships (grantees).

Building a National Program

In late 2001, the Foundation selected the UNC Gillings School of Global Public Health (the School) at The University of North Carolina at Chapel Hill to host the NPO for ALbD. Working in partnership with RWJF, these NPOs are responsible for myriad activities, including but not limited to developing and implementing program strategy; convening and staffing a national advisory committee to review proposals and recommend the

portfolio of grantees to be funded; and providing ongoing technical assistance and consultation to grantees. In addition, NPOs contribute to field-building efforts by delivering presentations; organizing conferences and meetings; participating in task forces and advisory committees; developing curricula, tools, and resources; and disseminating lessons learned and results. An RWJF program officer, communications officer, and grants administrator support national program staff and provide a link back to RWJF. Through a multi-year grant to the national program's host institution (frequently a university or a large nonprofit organization with special expertise), this model provides an efficient, cost effective way for the Foundation to remain closely involved in strategic initiatives without expanding its permanent staff or assuming responsibility for day-to-day program operations.

Although the School had no centralized presence in the emerging field of physical activity and the built environment, a variety of factors made it an appealing candidate: an excellent reputation and expertise in public health practice, committed leaders with strong links to RWJF, experience collaborating across disciplines, access to resources and professionals within UNC-Chapel Hill and at other area universities, and a rich pool of talent within the region from which to recruit staff.

In the first year of program operations, ALbD secured and built office space, recruited a multidisciplinary project team, developed a comprehensive website and a variety of resources and tools, developed the 5P (preparation, promotion, programs, policy, and physical projects) community action model,¹⁶ convened a national advisory committee, engaged in outreach with a variety of partners, and launched the call for proposals (CFP). The initial staff consisted of eight full-time employees: the director, deputy director, communications officer, three project officers, project assistant, and administrative assistant. In addition, ALbD hired a part-time doctoral student, the first of many graduate assistants who would play a critical part in ALbD's work and who, upon graduation, would join the small but growing cadre of young professionals with expertise in this evolving field.

The original authorization for the ALbD program was \$16.5 million over 5 years. Of this, \$9.5 million was allocated for NPO operations and technical assistance,

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and \$5.5 million was for 25 grants to community partnerships (\$200,000 each over 5 years). An additional \$2 million was reserved in a special opportunities fund that communities could access midway through their grant periods to help bolster their work. Two years into the grant program, the special opportunities fund was reduced to \$1 million, for a total investment of \$15.5 million. At about the same time, the authorization period was lengthened from 5 years to 8 years in order to better align with ALbD's projected timeline: 2 years for program launch, CFP development and release, and grantee selection; 5 years for the provision of technical assistance to funded communities; and 1 year for the completion of evaluation and dissemination activities.

Even before its doors opened, ALbD fielded questions from partners, colleagues, and prospective staff members about plans once the grant period ended. Funded solely by RWJF, many assumed that the program would sunset, employees would find other professional opportunities, and, although some type of legacy would remain, ALbD would have difficulty fulfilling its potential as long as it was dependent on "soft" money (e.g., grants and contracts). However, ALbD leadership viewed this as opportunity to expand beyond a single grant program by building a dynamic organization that could serve other funders and communities. RWJF supported this philosophy by encouraging its grantees to think strategically and proactively about how best to leverage RWJF funding to help build on and sustain their efforts.

Diversifying Funding

During its first 3 years of program operations, ALbD staff focused on being effective stewards of the RWJF grant by providing high-quality technical assistance and consultation to the 25 ALbD community partnerships, collaborating with RWJF and its other active-living grantees, helping to build the field, expanding its professional networks, and providing pro bono consultation to other organizations that were interested in engaging in this work.

These efforts paid off. In 2005, three philanthropic organizations approached ALbD with requests to partner on new, multi-year initiatives. Within North Carolina, the Health and Wellness Trust Fund sought assistance in developing and implementing a Fit Community designation and grants program, focusing on active living and healthy eating across the state. By the beginning of its fifth year, the program had recognized 20 municipalities and counties as a Fit Community and provided grants and technical assistance to 32 community partnerships. Similarly, the Blue Cross and Blue Shield of North Carolina Foundation expressed an interest in the ALbD 5P community action model and its replication in rural counties throughout the state. By the end of

third and final year of funding in mid-2009, the five Fit Together partnerships demonstrated the challenges and benefits of engaging in this work in non-urban settings. Finally, RWJF's emerging interest in childhood obesity provided an excellent opportunity to launch Healthy Eating by Design, an 18-month pilot program to test whether existing grantees could leverage their experience to support healthy eating, a new but complementary area of focus for the NPO. As a result of all of these initiatives, ALbD hired three new staff members, expanded its presence in its home state, deepened its knowledge of rural issues, broadened its scope to include healthy eating, and gained valuable experience working with other funding partners with different challenges, cultures, expectations, and aspirations.

In 2006, ALbD was approached by Blue Cross and Blue Shield of Minnesota and the W.K. Kellogg Foundation, which resulted in invitations to apply for two additional multi-year grants. ALbD pursued these opportunities, recognizing that staffing requirements could be met in part with existing employees, whose time commitment to the RWJF-funded program was expected to decline in the final years of the grant. It also enabled ALbD to augment its core team with consultants and contractors to help maximize flexibility while maintaining a relatively lean infrastructure. In addition, these engagements gave ALbD staff additional experience working with new funding partners and in an array of communities.

Maturing As a National Organization

As ALbD grew in complexity, a more formal process was needed to determine whether and when to pursue new initiatives. Internal discussions generated ALbD's "principles for saying yes," criteria used to screen new business development opportunities. Key considerations included whether the opportunity would:

- create capacity within ALbD and the client's organization
- help ALbD expand its competencies in key areas
- offer reasonable compensation relative to the work
- provide substantial exposure to and/or create relationships with important group(s)
- enhance ALbD's sustainability
- have an impact on work with existing clients in a net positive (or at least neutral) manner
- generate opportunities to create products or tools that were marketable, replicable, and/or could be disseminated to others
- have reasonable and/or negotiable timelines and deliverables
- serve as a model for the movement

At the same time, ALbD began meeting with members of its national advisory committee and RWJF staff to engage in strategic discussions about the future. An

important first step was to determine whether there would be continued collaboration with RWJF. If not, then it would be essential for ALbD to cultivate new partners and refine its business model. A major strategic consideration was whether ALbD was appropriately positioned as part of a large state university or whether it should consider seeking status as a separate 501(c)(3) organization. Although both approaches had advantages and disadvantages, ALbD leadership believed that in the immediate future, the infrastructure, operational, and political costs of leaving the university would outweigh the projected benefits of launching an independent nonprofit organization.

Additional conversations during this time focused on ALbD's brand. Once defined solely as a national program of RWJF focusing exclusively on active living and the built environment, ALbD was clearly evolving into something larger. In 2006, with initial assistance from Spitfire Strategies, ALbD began thinking about how best to refine its brand. Additional work with Pyramid Communications to rebrand its website in late 2008 culminated in the release of a new logo and tagline designed to reflect ALbD's transformation from an individual grant program supported by one funder to a service organization with multiple clients and the capacity and expertise to address active living and healthy eating systems, policies, and environmental change initiatives (www.activelivingbydesign.org/about-albd/albd-has-new-look). Despite its expanded mission and focus, ALbD chose not to change its name due to the national reputation and recognition it had built since the program's inception. Instead, it adopted a "big B" to distinguish the organization from the soon-to-be-sunset grant program. Today, Active Living By Design (ALBD) creates community-led change by working with local and national partners to build a culture of active living and healthy eating. Its vision is of healthy communities where routine physical activity and healthy eating are accessible, easy, and affordable to everyone.

Adapting to National Trends

As it expanded, ALBD benefited from many internal strengths and external opportunities, including a talented and committed staff, grantee satisfaction with technical assistance and consultation, and excellent relationships with its funding partners. Most importantly, increased attention to the obesity epidemic and awareness of the health and economic impacts of sedentary lifestyles and poor nutrition generated a heightened commitment to community-based active-living and healthy-eating policies and environmental change initiatives.

Active Living By Design also grappled with a variety of challenges. Managing growth and diversification, demonstrating quantifiable value through independent evaluation studies, and integrating active living and

healthy eating within program operations and in the provision of technical assistance to grantees were among the most apparent. Ensuring that ALBD was not perceived exclusively as an RWJF national program, maintaining a culture of flexibility and nimbleness within the complex administrative structure of a large state university, and recruiting and retaining an ethnically and culturally diverse staff with subject matter expertise and community-based experience were additional considerations. Finally, ALbD's expansion in 2005 coincided with the departure of its founding director as well as its original RWJF program officer, both of whom were senior professionals with vision, extensive national networks, and reputations as national experts. While turnover and the potential loss of institutional memory and key relationships could have generated insurmountable obstacles, ALBD responded by creating a flatter organization and a more collaborative environment. Despite nearly doubling its staff from 2005 to 2008, turnover remained very low due to strategic recruiting, ongoing attention to professional development and employee satisfaction, a commitment to team building, and an organizational structure and culture that emphasized shared decision making and accountability.

The Next Chapter

By late 2007 and after nearly 18 months of ongoing discussions and collaboration, ALBD was chosen to lead Healthy Kids, Healthy Communities (HKHC), a 5-year national program and one of the Foundation's largest community action initiatives to date (www.healthykidshealthycommunities.org). HKHC, which launched in 2008, focuses on systems, policies, and environmental change strategies to support healthy eating and active living, and it places special emphasis on reaching children who are at highest risk of obesity. Ultimately, partnerships from 50 communities across the nation will receive 4-year grants as well as technical assistance and consultation to support their work. This challenge and opportunity will require ALBD to expand its reach and, in doing so, adapt its technical assistance model.

The selection of ALBD to lead HKHC as well as its ongoing work with other philanthropic organizations is a testimony to ALbD's effective stewardship of the initial RWJF grant and its ability to think about program evolution and sustainability in a flexible manner that does not result in mission drift. Moreover, it is a tribute to the work of the 25 ALbD community partnerships, without which ALBD's work and its sustainability would not have been possible. As ALBD has evolved, its mission and focus have expanded, but its commitment to healthier communities has not changed. ALBD staff are deeply committed to this work and "walk the talk" as individuals, family members, citizens, and profession-

als. What started as a 5-year grant program and a considerable leap of faith by one grantmaker has evolved into a national movement. ALBD has laid a foundation for long-term sustainability, and its legacy is already in the making: a network of healthier communities resulting from policies and environmental changes that will endure for generations to come.

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