

# The Food Trust's Heart Smarts Toolkit



Across the country, health educators, medical practitioners and community leaders have identified diet-related health problems as a major threat to the well-being of the communities they serve. Heart Smarts is an innovative and effective approach to improving the health of underserved communities.

The Heart Smarts program meets residents where they are, bringing nutrition education, health care, social services and increased food access into the local corner or grocery store. Since its launch in 2010, the program has grown from a small pilot in Philadelphia to an evidence-based model for providing community nutrition education and prevention services in high risk communities. In addition to the program's recent growth, **the Heart Smarts curriculum is also now approved for use in the PA SNAP-Ed program and available to other SNAP-Ed programs throughout the country.** For more information on the Heart Smarts program or to order program materials, including the Heart Smarts lesson booklet and visuals, please fill out [The Food Trust's Request Form](#).

This toolkit, created with support from the Robert Wood Johnson Foundation, aims to guide practitioners through all aspects of the Heart Smarts program, from identifying stores and developing partnerships to implementing core program components and evaluating outcomes.

# Introduction: What is Heart Smarts?



**Across the country, millions of children and families live in communities with limited access to healthy, affordable food.** According to estimates from the USDA and elsewhere, nearly 40 million people experience the hardships and consequences of inequitable food access, traveling long distances to reach the nearest supermarket and often relying on small corner or convenience stores, with mostly processed foods and few healthy options, to purchase food. This issue disproportionately impacts lower-income communities of color as well as residents in rural areas and small towns. These same communities suffer from high rates of heart disease, diabetes and other diet-related diseases, problems exacerbated by both **poverty and the lack of healthy food resources**. The recent evaluation of the dietary patterns of Americans, for example, found that those with low socioeconomic status had worse dietary quality than more affluent Americans and that **the gap between socioeconomic levels grew between 1999 and 2010**.

In response, advocates across the country have developed a range of strategies for increasing the availability and accessibility of healthy food in communities that need it most, from bringing new supermarkets to underserved communities to working with small store owners to increase healthy offerings. **Evidence is growing that a comprehensive approach, combining increased access with community engagement, education and incentives to encourage healthy choices, can have a meaningful impact on people's diet and health.** The Heart Smarts program is a new model that brings together all of these components: nutrition education and incentives, food access and free health and

social services offered to customers in a supportive store environment. Heart Smarts empowers residents with the information and resources they need to improve their health.

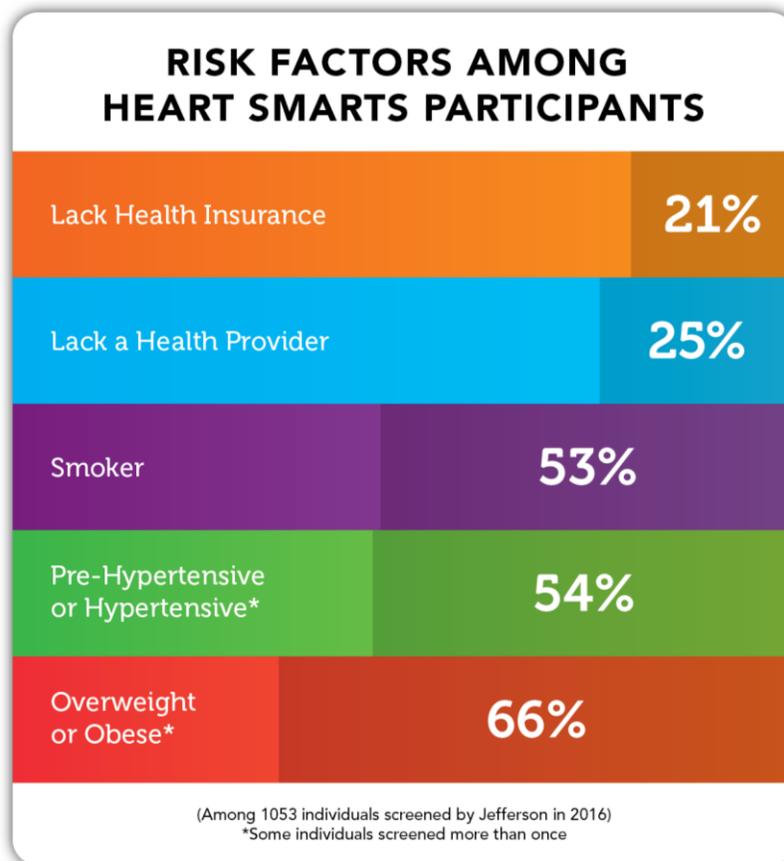
The Food Trust began working with corner stores in 2004, recognizing the important role that these stores play in many lower-income neighborhoods. In fact, a typical shopper makes one large monthly shopping trip to a supermarket or superstore for most of their grocery needs and relies on small food stores to fill the gaps. These trips are typically several times per week, not infrequently once or twice a day. **The Healthy Corner Store Initiative works with store owners to increase healthy food inventory and build customer awareness by providing customized training, marketing materials and equipment to stock and sell healthy food.** In 2010, The Food Trust, in partnership with the Philadelphia Department of Public Health, expanded its program citywide, forming one of the largest such networks in the country. The Healthy Corner Store Initiative now works with stores throughout Pennsylvania and other states and serves as a model for organizations across the country committed to improving food access across the country.

As part of this expansion, The Heart Smarts program, launched in 2010 to create a meaningful link between store owners and the communities they serve, established stores as “community hubs” that not only offer healthy, affordable food but also provide residents in-store nutrition education; coupon incentives to purchase healthy products; as well as health screenings, counseling and referrals carried out by local health care institutions. Heart Smarts leverages the important role that food retailers play in communities and works to address social determinants of health by helping participants access needed community health and social services such as health insurance, SNAP (food stamps), a local food pantry, a public health clinic or smoking cessation resources or exercise programs. **Heart Smarts provides a new model of bringing coordinated public health and social services into the store environment, meeting people where they are and empowering residents to improve their health.**



The Heart Smarts program has grown from a small pilot in Philadelphia to an evidence-based model for providing community nutrition education and prevention services. Currently, it is being implemented by The Food Trust and partners in over 100 stores in high-need communities in Pennsylvania, New Jersey and Delaware. While first developed for corner stores, the Heart Smarts curriculum has been successfully implemented in a variety of retail settings, including mom-and-pop grocers and even large supermarkets, and was recently approved by the USDA for the SNAP-Ed program. In all Heart Smarts stores, staff provide shoppers with store-based nutrition education and recipe tastings using a dedicated curriculum designed for the store environment. Store owners also receive training and resources to help them expand their healthy food marketing and inventory. Individuals who participate in the nutrition lessons can receive “Heart Bucks” coupons to purchase healthy products such as whole grains, fruits and vegetables or healthy proteins. A subset of stores integrates free monthly health screenings, including blood pressure, BMI and heart/stroke risk assessment, along with counseling conducted by local universities and health care institutions. Health care partners conduct follow-up calls for counseling and encouragement and provide referrals to local health providers or public health clinics, helping at-risk adults identify and reduce modifiable risk factors for heart disease and stroke and get the follow-up care they need. And with permission, primary care providers are kept informed of their patients' progress. Heart Smarts also provides shoppers with linkages to other free or low-cost services such as support for smoking cessation, physical activity, health insurance sign-up and food assistance, all within the convenience of a local corner store or neighborhood grocer.

**While still a relatively new model, a growing body of evidence demonstrates that the Heart Smarts model is an effective way to reach high-risk individuals and reduce their risk of diet-related disease.** For example, data collected by The Food Trust and Thomas Jefferson University Hospital’s Center for Urban Health from nearly 1,700 Heart Smarts screenings in Philadelphia show that the vast majority of Heart Smarts participants are from minority populations, especially Latinos and African Americans: 79% were African American, 10% were Latino, 7% were White, and the remaining were other or mixed race or ethnicity.



Of note, the program serves many African American men, a group that is often hard to reach in other community-based health promotion programs. Findings also show that Heart Smarts has a significant impact in raising awareness about blood pressure among a population of people who have substantial risk factors (66% were overweight or obese, 53% were smokers); poor access to care (21% were uninsured, 25% did not have a primary care provider); and are largely unaware of their heart disease risk. Many participants did not know they were pre-hypertensive or hypertensive until they were screened in the store. In addition to the positive impacts for participants, Heart Smarts programming also benefits store owners, drawing traffic to the store and creating a positive environment, thereby improving the perception of the store within the community as well as increasing sales of healthy items.

**This toolkit is intended to walk practitioners through all aspects of the Heart Smarts program; whether you are already working with an established network of stores in your community or just getting started, it will take you from identifying stores and developing partnerships to implementing core program components and evaluating outcomes.** The program is highly customizable and guidance is provided to tailor programming for a variety of retail settings, from small corner stores to large supermarkets. Heart Smarts program components can be implemented individually or layered

based on local resources and partnerships. For example, Heart Smarts nutrition lessons and food tastings can be conducted without incorporating in-store health screenings or providing Heart Bucks coupon incentives. Additional components can be added in phases, as relationships are developed with local health care institutions, for example, or resources identified to support Heart Bucks incentives. Guidance is provided to troubleshoot common challenges along the way as well as links to additional resources available from The Food Trust and elsewhere to support Heart Smarts programming. To order copies of the Heart Smarts curriculum, including lesson booklet and visual aids specifically designed for use in the retail setting, and corresponding Get Healthy Cards and recipe handouts, fill out [The Food Trust's Request Form](#).

### **Heart Smarts and the SNAP-Ed Program**

In addition to the program's recent growth in Pennsylvania and the tri-state area, the Heart Smarts curriculum, which includes eight nutrition lessons designed for the store environment, is now approved for use in the PA SNAP-Ed program and is available to other SNAP-Ed programs throughout the country. Heart Smarts encompasses SNAP-Ed's multi-level approach by combining direct nutrition education with policy, systems and environmental (PSE) interventions to facilitate the adoption of healthy food choices in the retail setting. The program is designed to follow SNAP-Ed best practices by bringing together the multiple sectors that shape an individual's food choices (Social-Ecological Model) and by following the Dietary Guidance for Americans. Heart Smarts also addresses many of SNAP-Ed's priority indicators in the evaluation framework including the individual, multi-level and public health approaches.

# Getting Started with Heart Smarts

The Heart Smarts program brings nutrition education, healthcare and social services into the retail environment. As such, a critical first step to launching a Heart Smarts program involves building relationships with potential programming partners, defining roles and responsibilities and engaging store owners in your community. **This section provides guidance on the types of partners who may be a good fit for Heart Smarts programming as well as how to identify and talk to store owners about the program.**

“This program has helped my store stock and sell healthy products, like fruits and vegetables, and has also brought the community together. I am happy to be a part of the change. Customers are always so excited to come monthly to get their blood pressure checked and purchase healthy options with their Heart Bucks.”

—OWNER, CEDAR FOOD MARKET, WEST PHILADELPHIA

## DEVELOPING PROGRAM PARTNERS

**Given the multi-faceted nature of the program, Heart Smarts programming often involves multiple partners, each of whom brings a unique set of skills and resources to the project.** For example, some organizations may be able to provide nutrition education programming but need assistance with health screenings or retail-based work, while others may be able to work with stores on inventory and marketing but may need support with nutrition education. It’s worth noting that it’s not necessary to include all of the partners or programming components listed below, and in some cases, one organization may be able to take on multiple roles.



### Nutrition Education

**Conducting in-store nutrition lessons, recipe tastings and store tours is a central component of the Heart Smarts program.** Across the country, there are many different types of organizations involved in nutrition education including local health departments, hospitals, universities and non-profits that may be interested in bringing their work into the retail environment. If you are looking to identify a

nutrition education partner in your community, consider connecting with your state's SNAP-Education provider, local health department or university health education, nursing or nutrition department. Heart Smarts nutrition education will be discussed in more detail in the [next section of this report](#).



## Healthy Retail Development

**To maximize impact, Heart Smarts programming can go hand-in-hand with other environmental changes in the store** such as inventory changes to incorporate more healthy products, a marketing campaign to highlight healthy items, or merchandizing strategies such as healthy check-out aisles. These efforts could also be led by a local health department, non-profit organization or SNAP-Education partner. It's a good idea to connect with any existing healthy retail initiatives in your community to explore partnership opportunities. More information on how to work with stores to promote healthy options is available in the [USDA's Healthy Corner Stores guide](#).



## Health Care

**Local hospitals, universities (e.g. medical, nursing, pharmacy or public health schools) or public health department may be able to conduct in-store health screenings** and provide participants with follow-up counseling, referrals, mental health screenings and other services. Non-profit hospitals may be able to utilize their community benefit dollars to support their staff time and related expenses and so are often good places to start, along with universities that can incorporate programming into their training curriculum. More information on the role of the health care partner can be found in the last section of this report: [Integrating Health Screenings and Social Services](#).



## Social Service Providers

**Organizations that provide other community services** such as SNAP enrollment outreach and tobacco cessation counseling may be interested in bringing these services into the retail setting as part of a comprehensive Heart Smarts program. This may include partners outside of the typical public health and nutrition circles so consider the needs in the community where you are working and think broadly about organizations that may be able to help address social determinants of health and bring needed

resources to local residents. More information on integrating social services can be found in the last section of this report: [Integrating Health Screenings and Social Services](#).



## Store Owners

**A successful Heart Smarts program relies on a good relationship with the store owner or retail partner.** While the Heart Smarts curriculum was designed with the corner store in mind, it has been successfully implemented in a range of retail formats including mom-and-pop grocers and large supermarkets. Regardless of the store size, the store owner or manager should be supportive of the goals of the program and the local community. [The following section](#) provides more information on how to identify and select stores for programming.



## Schools and Youth Programs

**Corner stores are frequent destinations for children, many of whom stop daily on the way to and from school for snacks.** [A study published in \*Pediatrics\*](#) found that the average Philadelphia student purchases more than 350 calories on each visit to the corner store, consuming almost a pound worth of additional calories each week. While the Heart Smarts curriculum is designed for adults, partnering with schools and youth organizations to connect in-store marketing and youth-based nutrition education programs with healthy retail initiatives can broaden the reach and impact of the program. Students can create bulletin boards that showcase healthy snacks and beverages at the corner store, help develop youth-oriented marketing campaigns or even grow food to sell at the local store, as just a few examples.



## Neighborhood and Faith-based Organizations

**Partnering with local organizations can help get the word out about Heart Smarts and build community support for the initiative.** Local groups can assist with coordinating field trips to participate in the lessons and screenings or distribute flyers and other outreach materials to let the community know about the services being provided in the stores. Neighborhood and faith-based organizations can also share feedback and ideas about the food and health needs of their participants as well as the types of additional health and social services that could benefit the community.

The amount of funding necessary for Heart Smarts programming is dependent on the resources and capacity of your organization as well as what different partners are able to provide. For example, a SNAP-Ed provider may be able to provide staffing for Heart Smarts nutrition education lessons and environmental change work as well as money to purchase giveaways, like recipe cards. A healthcare partner may be able to fund health screening materials and staff-time and other partners may have resources to support store owners in making environmental changes in their stores. Heart Smarts is best carried out as a partnered effort with funding from various sources. Funding needs will also depend on the scale of the program with more stores and lessons requiring more resources. Support for programming costs such as staff time, marketing materials and coupon incentives, can also be leveraged through grants from foundations, state or local government or other charitable contributions.

## SELECTING STORES AND GETTING STARTED



**Heart Smarts programming can take place in a variety of retail formats including small corner stores, produce markets and full-service supermarkets.** While the process for selecting stores will vary depending on the retail landscape in your area, key characteristics of successful Heart Smarts stores include a demonstrated commitment to selling healthy foods or willingness to implement new healthy changes such as a healthy foods marketing campaign or displaying healthy products at the check-out counter; owner engagement and support for the program; sufficient customer flow during programming hours; and store space for programming.

Once a potential store is identified, it is important to have a conversation with the store owner about the program. Remember that a store owner's primary objective is to run their business. As such, they

may not be available to speak with you on an initial visit or even be present in the store. Be courteous to staff and don't be deterred if it takes several visits to the store to connect with the owner. These initial visits to the store are also a good opportunity to introduce yourself to the community and get a sense of local needs and interest in the program.

Once you connect with the store owner, your introductory conversation should highlight the positive benefits of the program to both the store and community: Heart Smarts programming can draw traffic to the store, create a positive environment within the store and the community as well as increase sales of healthy items. Next, explain the basics of the program including the different programmatic components, such as nutrition lessons, food tastings, coupon incentives and health screenings. If coupons such as Heart Bucks will be provided as part of your programming, highlight this as a positive incentive for both the store and customers. Heart Bucks allow customers to try new healthy products at no or low-cost while providing the store with increased sales during programming. Heart Bucks and Heart Smarts programming may also encourage customers to continue to buy more healthy products even when programming is not happening in the store.

**It's important to remember that a key goal of these early conversations is to develop a positive relationship and build trust with the store owner.** Take the time needed to understand and address any concerns the owner may have about the program or your intentions. If both you and the owner agree that the store is a good fit for the program, review the logistics of the program, such as what equipment you will be bringing, where in the store programming will occur as well as the schedule and frequency of programming. Work with the owner to identify the appropriate point person for the intervention, such as a manager or employee who will be readily available and has decision making authority. It's also a good idea to obtain permission to work with other staff in the store such as the produce stocker or the cashier, particularly in larger stores.

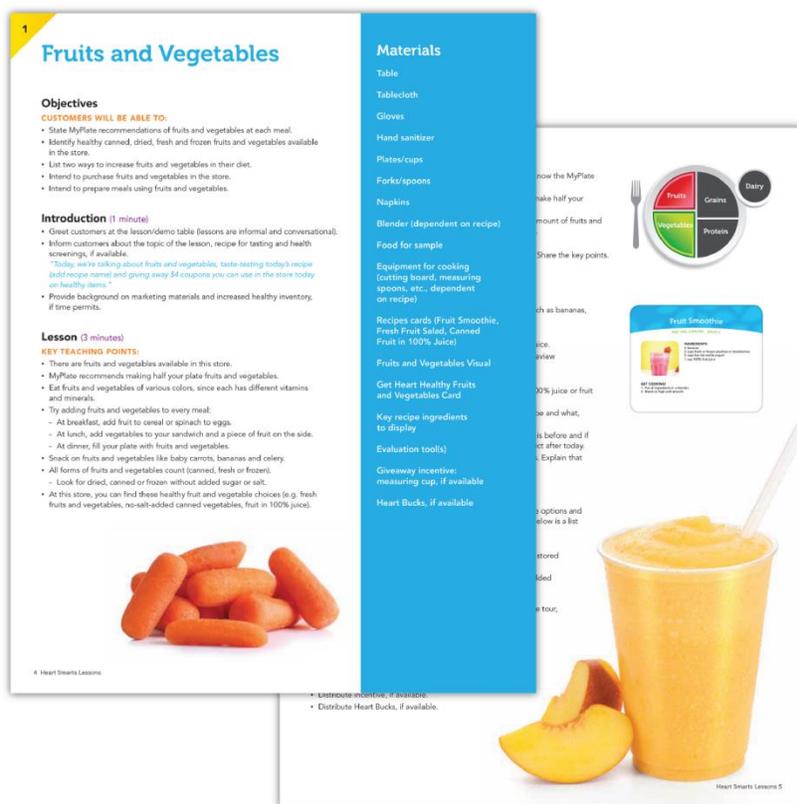
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|---|---|
| ✓ | <b>Identify start date and time for the program</b>                                   |
| ✓ | <b>Choose a location within the store for nutrition lessons and health screenings</b> |
| ✓ | <b>Review coupon incentive reimbursement forms with store owner</b>                   |
| ✓ | <b>Encourage owner to stock heart-healthy items</b>                                   |

# Heart Smarts Nutrition Education

“It’s hard to get healthier on your own. But when I can come to the store and get some healthy tips each month, it’s a little easier. I’ve been eating a lot more fruits and vegetables. Next up is the whole wheat bread.”

–MARILYN, OLIVARES FOOD MARKET, SOUTH PHILADELPHIA

Providing in-store nutrition education is a core component of the Heart Smarts Program. **The Heart Smarts curriculum includes eight lessons specifically developed for the retail environment focusing on topics such whole grains, fruits & vegetables and healthy snacking. Lessons highlight the healthy foods available in stores and provide information to encourage shoppers to make healthy choices.** Given the often-limited space available and the amount of time customers typically spend in stores, lessons are designed to be brief and interactive, incorporating components such as food tastings and store tours. Even in a short amount of time, in-store nutrition lessons can be an effective way to provide underserved residents with the information they need to improve their diet and health. A survey of over 600 participants in The Food Trust’s Heart Smarts lessons found that 89% of participants increased their knowledge of how to make healthy food or beverage choices, and most (80%) planned to make changes to what foods and drinks they buy based on the day’s lesson. In-store nutrition education also supports local stores, potentially increasing the sales of healthy items and the overall customer satisfaction with the store.



The Heart Smart lesson booklet details the objectives, key teaching points, methods and materials needed for each lesson, along with suggestions for additional optional components, including:

- Store tours:** Depending on staff capacity, Heart Smarts lessons can also include a brief store tour in which educators point out healthy options in stores that relate to the theme of the day's lesson. Tours are a great way to engage with shoppers and help them identify items they may not have realized were available or understand how to identify, such as whole-grain bread or low-sodium beans. Tours provide an opportunity for educators to help customers read nutrition labels and compare products to identify the healthier choice. The Heart Smarts lesson booklet includes suggestions for each lesson on specific items to highlight as part of a tour. Adding shelf talkers and other signage in stores can also be a good way to help shoppers identify healthy items and promote the sale of these products throughout the month.
- Food Tastings:** Providing samples of a food or recipe is a good way to draw customers to the table to participate in the lesson. Each lesson includes suggestions of recipes or taste tests to feature based on the theme, such as smoothies for a fruit and vegetable lesson or black bean salad for a lesson on sodium or healthy proteins. Recipes are designed to be to be affordable, costing less than \$5 to serve a family of four; easy to make with ingredients commonly found in corner stores; and,

of course, nutritious. Even if food preparation is not a possibility, samples can be offered of ready-to-eat items such as a whole-grain cereal, applesauce or baby carrots with hummus.

- Giveaways:** Providing participants with something to take home as an incentive for participating in the lesson can also encourage participation and help shoppers make healthy changes once they are back home. For example, The Food Trust provides a can strainer as part of the sodium lesson so that participants can rinse the sodium off of canned beans or vegetables. Tip sheets such as Get Heart Healthy Cards, which contain facts related to the lesson being taught that day, and recipe cards are also good giveaways to reinforce the information provided during the lesson.

## Avocado and Tomato Sandwich

PREP TIME: 5 MINUTES SERVES 4



**INGREDIENTS:**  
 8 slices whole grain bread  
 2 medium tomatoes, sliced  
 1 ripe avocado, halved and pitted  
 Salt and pepper to taste (optional)  
 1 teaspoon olive oil (optional)

**GET COOKING!**  
 1. Toast the bread.  
 2. Layer tomato and avocado on a piece of toasted bread. Sprinkle with salt and pepper and drizzle olive oil. Top with another slice of bread.

**NUTRITION FACTS**  
 serving size:  
 1 sandwich  
 200 Calories  
 7g Fat  
 1g Saturated Fat  
 266mg Sodium  
 29g Carbohydrates  
 5g Fiber  
 7g Protein



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REALLY PHILLY  
HEALTHY. A LITTLE BIT.



PHILADELPHIA HEALTHY CORPS NETWORK

## Get Heart Healthy!

### eat fresh, feel good

**Choose heart healthy foods every day!**



Fresh fruits and vegetables keep you healthy.



Dairy foods help build strong bones and teeth.



Whole grains provide fiber, vitamins and minerals for good health.



Water and drinks without added sugar are healthy low-calorie options.

**Heart Healthy Tip:** To help prevent heart disease, check food labels to find out which foods are heart healthy.

Choose heart healthy foods and drinks where ever you shop.

## Ways to be heart healthy...

1. Choose colorful fruits and vegetables for meals and snacks.
2. Limit salt and sodium in your foods.
3. Limit total fat in your foods.
4. Choose whole grains like whole wheat bread and cereal.
5. Cut back on buying take-out and fast foods that are high in sodium.




**Live heart healthy!**

Choose healthy foods every day

Exercise more often

Quit smoking



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SNAP

## TIPS FOR SUCCESSFUL IN-STORE NUTRITION LESSONS



Successful in-store nutrition education requires thoughtful planning and communication with store owners and community partners. Highlighted below are a few key suggestions based on The Food Trust's experience conducting Heart Smarts lessons in corner stores as well as larger grocery stores and supermarkets.

- **Schedule lessons at consistent days and times to encourage repeat participants.** Heart Smarts lessons are designed to be conducted as a series of up to eight lessons per store. Several series can be offered during the year. Lessons can be conducted on a weekly or monthly basis but should be held at a consistent day and time so shoppers know when to expect programming to occur. The Food Trust typically conducts lessons over a two-hour period either in the morning or afternoon, but programming could be extended based on staff capacity and the arrangement you have with the store owner or manager.
- **Position yourself at the front of the store for maximum visibility, if possible.** Don't be shy about approaching customers as they enter the store or wait in line to encourage them to participate in the lesson. At the same time, be mindful not to disrupt the flow of business and don't be offended if shoppers are in a hurry or just not interested in participating. Keep the interaction positive and let them know when you'll be back again.
- **Since space is likely to be limited, particularly in smaller stores, equipment should be kept to a minimum.** For example, The Food Trust educators typically conduct lessons at a small folding table and all materials, including food tasting, giveaways and lesson visuals must fit in this small space. While equipment needs can vary based on the recipe chosen, if you plan to prepare food on site, a

toaster oven or blender are good options for a corner store setting. Alternatively, consider preparing food ahead of time, rather than attempting a full-scale cooking demonstration. In either case, it's a good idea to check with your local health department about local guidelines for food preparation.

- **Consider time of day and season when selecting a recipe or food tasting.** For example, if you are conducting lessons in the morning, oatmeal or a whole grain cereal may be a better choice than whole wheat pizza. Additionally, taste tests can feature seasonal or local produce, to the extent it is available in the store where you are working. Always be sure to confirm with the store owner or a manager that the items you are planning to feature are typically sold in that store and will be available on the day of the lesson.
- **Outreach is critical to encourage participation and build community awareness of the program.** Distribute and hang flyers both in the store and at local schools, churches and other community sites. Ask the store owner or manager to help spread the word and hand out fliers to regular customers, along with any community partners working in the area. On the day of the lessons, consider using a sidewalk sandwich board or other means of publicizing the event outside to draw customers into the store.

# Providing Coupon Incentives

“What I like about the nutrition education lessons are the taste test and Heart Bucks. The taste tests give me opportunity to try new things and the Heart Bucks forces me to shop healthy.”

–RON, AZCONA SUPERMARKET, SOUTHWEST PHILADELPHIA

Healthy food incentives can boost demand for healthy products by making it more affordable for residents to purchase. These programs are gaining steam across the country in a wide range of retail settings including farmers markets, corner stores and supermarkets. **By providing shoppers with extra purchasing power to spend on fruits and vegetables and other healthy items, incentive programs are a win-win for consumers and store owners.** Coupon incentives such as Heart Bucks not only increase sales of healthy items while programming is taking place but may also encourage customers to continue to buy more healthy products throughout the month. Incentives can be integrated into Heart Smarts programming in a variety of ways depending on the availability of funding and type of retail setting where you are working.

The Food Trust utilizes coupon incentives known as “Heart Bucks” as part of its Heart Smarts program in corner stores to encourage participants to make healthy choices and reinforce the themes of the lessons. **Heart Bucks makes it easier for underserved shoppers to try new items for the first time without risking their precious food dollars by allowing them to do so at no or low cost until they feel comfortable buying the food with their own money.** Participants in Heart Smarts nutrition lessons or health screenings are given Heart Bucks coupons to spend in the store on approved healthy items, including fruits and vegetables, healthy proteins, whole grains and water. Coupons are provided to all program participants, regardless of income or eligibility for other benefits, such as SNAP, and must be used in-store on the day of the lesson while educators are in store so that redemption can be easily tracked and store owners reimbursed. This model works well in a small store setting as it does not rely on a sophisticated POS system, which many corner stores lack. While not an eligible SNAP-Ed expense, Heart Bucks can be funded through grants from foundations, state or local government or other charitable contributions. The Food Trust typically provides \$4 in Heart Bucks coupons to each participant, but that amount can be adjusted based on funding availability.



Another model for providing incentives is through the [USDA's Food Insecurity Nutrition Incentive \(FINI\) program](#). Through this initiative, first authorized as part of the 2014 farm bill, the federal government distributed over \$40 million in grants to partners across the country to implement incentive programs at participating farmers markets and supermarkets. These programs, such as Double Up Food Bucks, provide shoppers participating in the SNAP program with extra purchasing power to spend on fruits and vegetables. While these grants are limited, incorporating Heart Smarts programming at grocery stores and supermarkets participating in a FINI-funded incentive program is a great way to leverage resources and maximize the impact of these two programs. Stores participating in FINI are likely to be a good fit for Heart Smarts programming as they have already demonstrated a commitment to increasing the sale of healthy foods and an openness to community partnership.

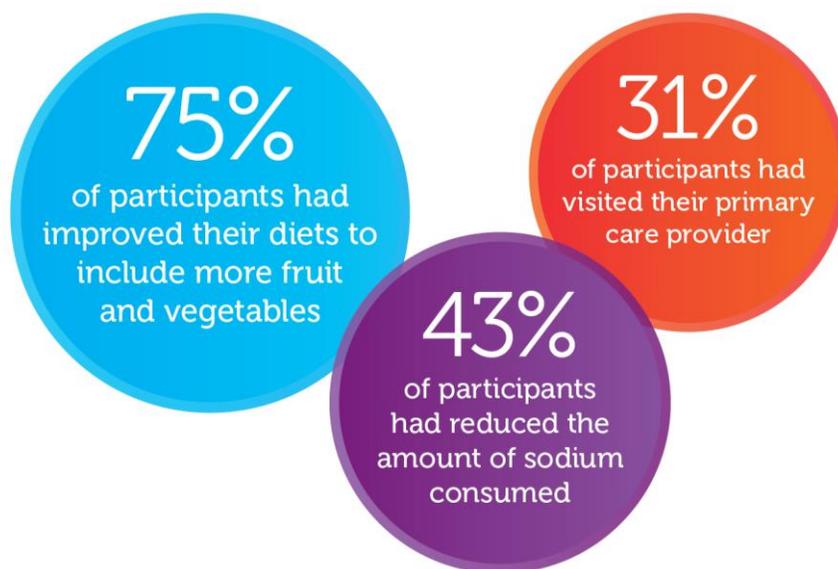
# Integrating Health Screenings & Social Services

“This is a great thing for the community. For a lot of older folks it’s hard to get to the doctor or the grocery store. Not only is coming to the corner store easy, but now it’s great for our health.”

– THERESA, CHRISTIAN FOOD MARKET, SOUTH PHILADELPHIA

Integrating health screenings and social service referrals into your Heart Smarts programming is an innovative way to provide residents with the information and resources they need to improve their health. **By bringing these services into the local corner or grocery store, Heart Smarts stores serve as “community hubs”** where residents can not only shop for healthy, affordable food and receive nutrition education but also meet with a health care professional and learn about resources available to them in the community. Heart Smarts meets residents where they are, making it easier for them to understand their risk profile and access needed services all within a familiar store environment.

Data collected by The Food Trust and Thomas Jefferson University Hospital’s Center for Urban Health (below) demonstrate that Heart Smarts health screenings and education can result in meaningful impacts on people’s diet and health. This section discusses the key components of Heart Smarts health screenings, best practices for successful in-store screenings and suggestions for other services that can be included depending on local resources and the needs in your community.



\*Data collected via follow-up calls with participants with elevated blood pressure at initial screening.

### **Identifying a Health Care Partner**

The first step to incorporating health screenings and referrals into your Heart Smarts programming is to identify a health care partner with the interest and capacity to support the initiative. Ideally, health screenings are done regularly as part of the Heart Smarts program, allowing for follow-up, monitoring and communication with health care providers, which is key for behavior change. While The Food Trust has worked with a range of health care partners as part of its Heart Smarts programming, nonprofit hospitals are often a good place to start as they may be able to utilize their community benefit dollars to support their equipment and staff time to travel to and conduct screenings, follow up with participants and collect and analyze data. Nonprofit hospitals are mandated by the IRS to create a Community Health Needs Assessment (CHNA) and Implementation Plan. These documents are publically available and can help to identify relevant priorities for the hospital, such as obesity, heart disease, stroke or diabetes. Some hospitals may explicitly prioritize addressing upstream factors such as low food access, food insecurity and access to care in their CHNA, providing a good entry point for conversation. Universities, including medical, nursing and pharmacy schools, can be good partners as well and may be able to integrate Heart Smarts screenings and counseling into their training programs. Heart Smarts provides an opportunity for local health care providers to reach at-risk residents who may not otherwise access preventative services and for students to get valuable community experience.

### **Developing a Protocol for the Screenings**

Once a partner has been identified, work together to clarify the protocol for the screenings as well as any follow-up that may be conducted. For example, Heart Smarts screenings often include free blood pressure screening, BMI measurement and cardiovascular disease risk factor counseling. Those found to be at risk through screening can then be referred to their health providers or local public health clinics for follow-up evaluation and care. By connecting the “clinic to the community” healthcare providers can refer their patients to a convenient community site for blood pressure monitoring and with the patient’s permission receive regular communication about their patient’s progress. Reminder phone calls can be made to encourage repeat visits and monthly follow-up calls monitor progress in achieving personal lifestyle goals and encourage return visits. At-risk individuals may also be referred, as appropriate, to free or low-cost community resources such as support for smoking cessation, physical activity, health insurance sign-up, food assistance and other needed benefits. This is also a good time to discuss the schedule and frequency of the screenings and confirm who will be providing needed materials like a table and chairs, scale and blood pressure cuff.

It’s worth noting that while Heart Smarts health screenings often take place within the store itself, in some cases, a health care partner may prefer to bring a van or mobile clinic to park outside the store.



If resources are available, hiring a part-time Community Health Worker (CHW) can be a great way to help participants access needed services while building local capacity and community buy-in for the program. In Philadelphia, The Food Trust works with two Community Health Workers. These trusted local residents assist participants in the store to identify healthy foods to purchase and discuss diet-related health and social service needs. CHWs are then able to follow up with participants between screenings and make referrals depending on the needs identified. CHWs can also be trained on tobacco prevention strategies and SNAP enrollment and pre-screening and can offer these services directly to residents in their communities. Additionally, CHWs can help conduct outreach for the program at local churches and community sites to increase participation in Heart Smarts nutrition education and health screenings and build local awareness of the program. Lankenau Medical Center, part of Main Line Health, is using Medical Student Advocates to identify and address social determinants of health alongside its Heart Smarts health screenings. These trained medical students conduct a social needs survey as part of the screening to identify a variety of potential social needs such as those related to food insecurity, childcare, employment, transportation and access to primary care. The students can then follow up with participants with referrals to local resources and social services and continue to connect with the participant until the resource need is resolved.

## HEART SMARTS HEALTH SCREENINGS BEST PRACTICES



- **Selecting stores for screenings:** Be mindful that not every store will be a good fit for this additional programming. Stores must have sufficient space for both a nutrition education table as well as a separate area for the health screening to take place. While the program was designed with small

stores in mind and each component only requires a small card table as well as chairs for the screening, some stores may just be too small or cramped. Unlike lessons, which are best held in a highly visible part of the store, health screenings should ideally take place in a more private area, such as in the back of the store or an unused part of an aisle.

- **Scheduling screenings:** While some partners may wish to start with a one-time pilot, it is ideal if screenings can occur on a regular monthly basis, in conjunction with a Heart Smarts nutrition lesson. To encourage repeat visits, try to maintain a consistent day and time for the screenings, such as the first Tuesday of the month, so residents know when to expect programming to occur. Consistent staffing each month can also support relationship building and sustain health outcomes (Lankenau Medical Center found that consistent staffing led to a higher rate of repeat participants).
- **Following up with participants:** In some cases, health care partners are able to follow up with participants between screenings via phone. For example, in Philadelphia, those with elevated blood pressure receive a call to assess their follow-through with recommendations to see their primary care provider or take other actions to improve their health, and all participants can receive reminder calls for upcoming screenings. While resources may not always be available to support this additional level of programming, it can help to reinforce messaging and encourage follow-through.
- **Communicating with partners:** As in any partnered initiative, communication is essential to ensure that everyone is on the same page about program. It's a good idea to establish regular calls with your health care and/or social service partners to review logistical details, such as who will be providing the equipment needed for the screenings and troubleshoot any challenges that come up.
- **Data collection:** When planning your Heart Smarts evaluation, it's a good idea to discuss with your health care partner what data they will be collecting and how and when such data can be shared. For example, The Food Trust's health care partners share summary data on participants' weight, BMI and blood pressure levels, including changes over time, as well as demographic data and metrics related to access to care, tobacco usage and other lifestyle measures.

**“Last Thursday at Olivares Food Market,** one of my regular participants braved the cold to get her blood pressure checked during one of our screenings. The woman, in her late 70s, had been to the ER the previous week for issues related to her high blood pressure. The ER encouraged her to follow up with her doctor to have her blood pressure rechecked; but due to the cold, she couldn’t take the bus to her doctor. She was, however, able to bundle up and cross the street to get her blood pressure checked at Olivares.

Afterward, she also participated in my lesson on sodium. We reviewed how to read a nutrition label, how to rinse and drain canned veggies and beans, and how to cut back on packaged snacks. She says she plans to incorporate many of the tips into her diet as well as share her results from the screening with her doctor.”

**-HEART SMARTS EDUCATOR**

# Evaluation and Conclusion

As with any intervention, it is important to evaluate the impact of Heart Smarts programming to better understand the program's effectiveness, identify areas that need improvement and to make the case for the program to potential funders and partners. While program evaluation in a corner store setting can be challenging, there are many ways to collect data that can both inform programming and provide outcomes for funders. The Food Trust conducts Heart Smarts evaluation on both an individual and environmental level in partnership with healthcare and social service partners. All outcomes are aligned with SNAP-Ed priority indicators.

"Since I started the Heart Smarts program last year, I've lost 40 pounds. Even better, my doctor says my A1C levels have decreased...and I'm happy to say that my diabetes is under good control now."

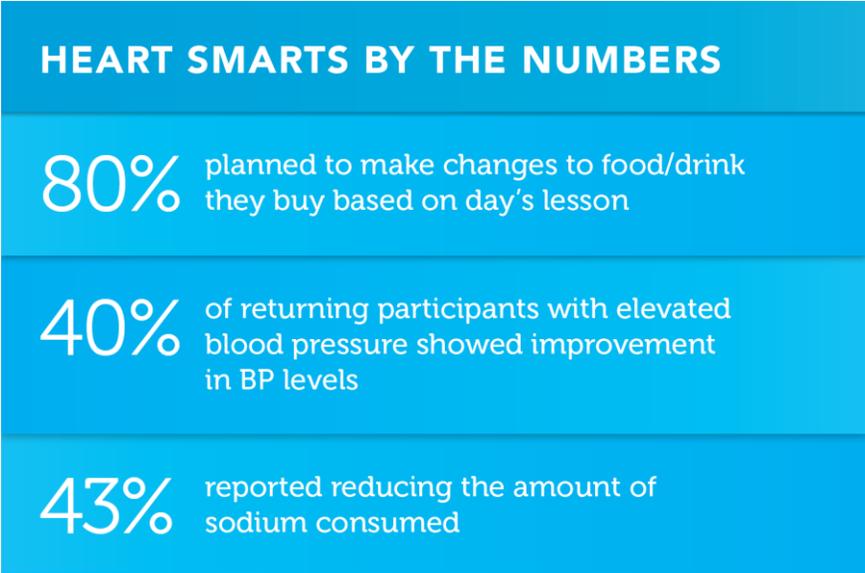
—EDWARD, FERRY AVENUE MARKET, CAMDEN, NEW JERSEY

After each Heart Smarts nutrition lesson, a short survey is administered to assess participants' knowledge, attitude and behavioral intention to make changes. Yes-or-no survey questions are tailored to the topic of each lesson; for example, "After today's lesson, I plan to buy healthier fruits and vegetables in this store" or "I plan to make meals using whole grain foods." **Findings demonstrate that Heart Smarts nutrition lessons improve both the health efficacy and behavioral intent of participants:** 89% of participants surveyed agreed or strongly agreed with the statement "After today's lesson, I feel like I know how to make healthy food or drink choices", and most (80%) planned to make changes to the foods and drinks they buy at the corner store based on the day's lesson. The Food Trust also tracks purchases made using Heart Bucks incentive coupons; the most commonly purchased items include fruits and vegetables, healthy proteins and water.

In stores where health screenings are conducted, health outcome data, including blood pressure and BMI, is collected and tracked over time. Data collected at health screenings can also help identify the population being served by the program and their diet-related health needs. For example, data collected by The Food Trust and Thomas Jefferson University Hospital's Center for Urban Health demonstrate that **Heart Smarts health screenings reach a predominately lower-income, minority population with substantial risk factors** (66% were overweight or obese, 53% were smokers) and barriers to accessing health care (21% were uninsured, 25% did not have a primary care provider).

Furthermore, data from follow-up calls and repeat visits demonstrate that screenings and education can have a meaningful impact on people’s diet and health. Among participants with elevated blood pressure who returned for subsequent screenings, 40% showed improvement in systolic blood pressure. Of those who showed elevated blood pressure levels and were reached by phone after screening, 52% reported having followed up with their primary care physician and 43% reported having reduced the amount of sodium consumed.

Since Heart Smarts programming is often part of a broader effort to expand the availability and marketing of healthy food in participating stores, The Food Trust also collects data on environmental changes within the store. This can include tracking the number of new healthy products a store has added using inventory forms, tracking sales data using Point of Sale Systems, as well as tracking purchases made with financial incentives, such as Heart Bucks coupons. For example, inventory data from The Food Trust’s Healthy Corner Store Initiative in Philadelphia found that 80% of participating stores added at least four new healthy products, and 87% added at least one new fruit or vegetable item.



**CONCLUSION**

Heart Smarts is an innovative and effective approach to improving the health of underserved communities. The Heart Smarts model recognizes the importance of meeting residents where they are, bringing nutrition education, health care, social services and increased food access into the local corner or grocery store. Across the country, health educators, medical practitioners and community leaders have identified diet-related health problems as a major threat to the well-being of the communities they serve. Heart Smarts offers an opportunity for these and other partners to work together, leveraging resources, relationships and expertise to empower residents to improve their health.

First launched in corner stores in Philadelphia in 2010, the Heart Smarts model has proven to be both replicable and highly adaptable; the program has been adopted statewide in Pennsylvania, and is expanding quickly in New Jersey and Delaware with growing interest from partners across the country. Heart Smarts programming is taking place in a range of retail settings from small corner stores and mom-and-pop grocers to large chain supermarkets, and with a diverse set of partners. **The Food Trust is committed to working with partners across the country interested in bringing this innovative model to their community.** We hope that this toolkit, along with the corresponding lesson booklet and visual aids, provides practitioners with the resources to get started. Together, we can reduce rates of diet-related disease and bring critical healthcare and social services to the communities that need it most.

For more information on the Heart Smarts program or to order program materials, including the Heart Smarts lesson booklet and visuals, please fill out [The Food Trust's Request Form](#).

