

Understanding and Planning for Sustainability

Sustainability Planning Template

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I. Introduction

Mathematica created the [Sustainability Planning Guide](#) and Template to support multi-sector community coalitions and partnerships addressing social determinants of health to advance health equity and prevent chronic disease as part of the [Improving Social Determinants of Health \(SDOH\)–Getting Further, Faster Initiative](#). This initiative is a partnership between the Centers for Disease Control and Prevention (CDC), National Association of County and City Health Officials (NACCHO), and Association of State and Territorial Health Officials (ASTHO). To promote collaboration and share learnings, NACCHO and ASTHO made this guide and companion fillable planning template available for use by any community coalition or partnership addressing SDOH. Although examples in this guide reflect the SDOH areas addressed by funded coalitions and partnerships—the built environment, food security, community-clinical linkages, social connectedness, and tobacco-free policies—the approaches and strategies are applicable to other SDOH areas.

Feedback from NACCHO, ASTHO, and the CDC informed and improved this guide and template. We are also grateful to Access Health Stark County, Community Connections, Food as Medicine Collaborative, Live Well Allegheny REACH, Maryland Living Well Center of Excellence, Proviso Partners for Health, and West Louisville Outdoor Recreation Initiative for contributing their insights to support development.

This guide and template can be used on its own or in conjunction with the [Policy Planning Guide](#) for SDOH teams looking to achieve their policy goals. We hope it will help you develop a culture of learning that supports your SDOH goals and advances health equity.

II. Sustainability Prioritization Worksheet

A. Purpose

The sustainability prioritization worksheet is a tool to help your coalition or partnership understand the key elements that make up the dimensions of sustainability and identify where to focus your energy first. This worksheet is meant to be a starting place for discussion and brainstorming. These elements described in the prioritization worksheet are a synthesis of tested resources specifically targeted to community coalitions and partnerships. See Supplement A in the sustainability planning guide for the list of resources.

B. How to complete the prioritization worksheet

The prioritization worksheet is a table that is organized by domains. Each domain is broken down further into elements. For each element, coalitions or partnerships will respond to three questions, which will help identify your priorities. Below are steps to complete the prioritization worksheet:

- Read the element.
- First, consider whether the element a top priority that you need to improve. If so, put a check mark in the box in the second column of the worksheet. If not, move on to the next element.
- Next, if you determined this element is a top priority, consider whether you need improvement plans or better improvement plans for this element. If you do, put a check mark in the box in the third column of the worksheet.
- Then, in the fourth column, put a check mark in the box if you have selected the first two boxes.
- Repeat this process for each element.

At the end of each domain, you will see space to add your own elements. This is space to add anything that is important to your coalition's or partnership's sustainability that is missing.

How do I know if an element is a “top” priority?

There is no easy answer to this question. A good place to start is by referring to the goals and outcomes of your logic model. If you can draw a clear connection between a sustainability element and those outcomes, that is a good indicator of a top priority. If you do not have a logic model or theory of change, developing one may be a good place to start your sustainability planning. [The University of Kansas Community Tool Box](#) can help you develop them. Other criteria you might consider are listed below. Whatever criteria you use, it is important to rely on the collective wisdom of your team. (See Supplement B in the sustainability planning guide for ideas on how to do this.)

- **Feasibility.** Are you able to do something about it now?
- **Cost.** Are resources available to address this element?
- **Availability of solutions.** Is there a clear path forward?
- **Expertise.** Do you have staff or partners with the expertise to make progress?

NACCHO'S [Guide to Prioritization Techniques](#) offers other considerations that coalitions/partnerships may find useful. ▲

C. Considerations

1. Collaborating to complete this worksheet

For most users, completing this worksheet will be a group effort. Refer to Supplement B in the sustainability planning guide for ideas on how to collaborate effectively, creatively, and inclusively.

2. Identifying top priorities

In Section III, you'll be asked to reflect on your top priorities to set goals. Members of your coalition or partnership should work together to decide which high-priority items you need to improve and identify those items for which you do not yet have a good plan. Sustainability elements for which you check both boxes in the prioritization worksheet may be a good starting place for identifying your priorities.

Note: If you find you checked both boxes for more than two to four of a sustainability domain's elements, go back and be more selective. Pay attention to the words "top" and "better" in the table; they are subjective, but you should interpret them in such a way that only the truly "top" priorities that need "better" plans end up with two checks.

3. Reflecting and reassessing

Sustainability prioritization and planning is a long and evolving journey. Completing this worksheet is just the first step in prioritizing sustainability elements to focus on. When you move into action planning in the next section, your priorities may change again. You can repeat this exercise in the future as you continue to reassess your priorities and update plans to reflect your progress and address changing circumstances.

Sustainability Domain: Community and Organizational Partnerships

Sustainability Element	Is this element a <i>top</i> priority that you need to improve?	Do you need improvement plans or better improvement plans for this element?	Did you check both boxes?
Vision of success shared by community	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Vision of success shared by partners	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Strong community support for our goals and activities	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Shared commitment with partners to a set of priority outcomes	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Shared commitment with community members to a set of priority outcomes	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Plans and activities aligned across partners	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
People with relevant lived experience empowered across coalition/partnership activities	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Relationships with influential community leaders established and maintained	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Partnerships sufficient in breadth and depth to achieve goals	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Supporters of coalition's/partnership's work within participating coalition organizations exist	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
<i>Add more rows for elements specific to your coalition or partnership as needed!</i>			

Sustainability Domain: Funding

Sustainability Element	Is this element a <i>top</i> priority that you need to improve?	Do you need improvement plans or better improvement plans for this element?	Did you check both boxes?
Funding sufficient to achieve program goals	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Financial plan to support growth and expansion developed and implemented	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Funding portfolio includes some resources that can be used at the coalition's or partnership's discretion	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Budget and funding coordinated with partners to advance strategic priorities	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Funding braided and blended across partners	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Community members involved in decisions about how funds are allocated	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
<i>Add more rows for elements specific to your coalition or partnership as needed!</i>			

Sustainability Domain: Governance

Sustainability Element	Is this element a <i>top</i> priority that you need to improve?	Do you need improvement plans or better improvement plans for this element?	Did you check both boxes?
Formally defined leadership structure established	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Formal processes for ensuring accountability for following through on commitments established and implemented	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Coalition leaders are representative of the community	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Power is formally shared with community and partners	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Formal documents, partnership agreements, memoranda of understanding, or similar arrangements govern partner relationships and operations	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Standard operating procedures or policies outline roles and responsibilities	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Leadership succession plans established	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Organizational policies and practices around diversity, equity, and inclusion implemented	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
<i>Add more rows for elements specific to your coalition or partnership as needed!</i>			

Sustainability Domain: Staffing

Sustainability Element	Is this element a <i>top</i> priority that you need to improve?	Do you need improvement plans or better improvement plans for this element?	Did you check both boxes?
Staff capacity sufficient to meet program goals	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Coalition or partnership staff reflect diversity of community	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Staff have required skills to carry out job duties	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Staff have tools, resources, and ongoing training necessary to carry out job duties	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Staff understand relevant cultural and community context	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Staff include individuals with relevant lived experience	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Coalition or partnership organizations offer at least a living wage and good benefits that support health and well-being for all employees	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
<i>Add more rows for elements specific to your coalition or partnership as needed!</i>			

Sustainability Domain: Ongoing Assessment and Quality Improvement

Sustainability Element	Is this element a <i>top</i> priority that you need to improve?	Do you need improvement plans or better improvement plans for this element?	Did you check both boxes?
Shared logic model or theory of change governs assessment and improvement activities	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Data necessary to assess and improve are collected	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
People with relevant lived experience are empowered in data collection process	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Data are used to assess and improve coalition/partnership operations	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Data are used to assess and improve coalition/partnership services	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
People with relevant lived experience are empowered in data analysis process	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
People with relevant lived experience are empowered in improvement processes	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Necessary data use agreements are in place	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Data are stratified by key demographics (e.g., race, ethnicity, socioeconomic status) to support equity in data collection, data analysis, and quality improvement	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
<i>Add more rows for elements specific to your coalition or partnership as needed!</i>			

Sustainability Domain: Strategic Communications

Sustainability Element	Is this element a <i>top</i> priority that you need to improve?	Do you need improvement plans or better improvement plans for this element?	Did you check both boxes?
Individuals with relevant lived experience are involved in creating communications strategy	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Individuals with relevant lived experienced are involved in creating communications products	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Communications empower community members with relevant lived experience who are the focus of change to become agents of change	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Communications clearly articulate a commonly understood mission and how programs/services fulfill that mission	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Communications products (such as flyers, infographics, emails, slide decks, or videos) are audience-specific and focus on audiences' motivations	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Data, including personal stories, survey data, research literature findings, and outcome data, are used creatively to support your messages and move your audience to action	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Communications use accessible language in ways that are familiar and comfortable to communities experiencing inequities	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Internal communications are intentional, respectful, and support alignment across the coalition or partnership	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
Communications are visually, cognitively, and technologically accessible for their intended audience	<input type="checkbox"/> Yes, this is a top priority	<input type="checkbox"/> Yes, we need plans or better plans	<input type="checkbox"/> Yes to both
<i>Add more rows for elements specific to your coalition or partnership as needed!</i>			

III. Table 1. Sustainability Pre-Planning

Step	Sustainability Pre-Planning Worksheet
SDOH our coalition addresses:	
1	Copy an especially important sustainability element from the prioritization worksheet in the space below.
	Priority sustainability element:
2	If there are other important sustainability elements you need to address to improve the element specified in #1, list them in this row.
	Additional relevant sustainability elements:
3	What, specifically, do you need to achieve to make progress on the sustainability element(s) above?
	We need to:
4	What is your rationale for #3? Why is it important? Refer back to your logic model or theory of change—how will achieving #3 help you achieve your desired outcomes? If you cannot articulate a connection to your desired outcomes, revise #3.
	Rationale for #3:
5	Put these together and write down your sustainability goal in one sentence using a VERB → OUTCOME → TIMEFRAME structure: Do [THIS] to achieve [THAT] by [WHEN].
	Sustainability goal:
6	How will you know when you've achieved your sustainability goal? By what standards will you measure success? How and when will you monitor your progress?
	Measurements:
7	How will you include individuals with relevant lived experience in the planning, processes, and activities necessary to achieve the sustainability outcome described above?
	Inclusion plan:

IV. Table 2. Sustainability Action Planning

Sustainability Goal	Paste the goal you drafted in step 5 from Table 1 in the cell to the right.		
Responsible individual(s)	Identify the individual(s) who will be responsible for implementing the overall plan, updating the plan, and who will be accountable for achieving the goal. This person(s) does not have to do all the work, but needs the skills, authority, and time to oversee the plan and ensure it is carried out.		Type response here.
Assets	Identify strengths, resources, or past experiences that you can use to help achieve your sustainability goal. Then check your plan to see how you can improve it by leveraging those assets.		Type response here.
Anticipated barriers	Envision working to achieve this goal and visualize the challenges for which you will need to plan. Make sure that those potential barriers are addressed in the plan below.		Type response here.
Reassessment cadence	Define a cadence—for example, biweekly, monthly, or quarterly—at which you will formally reassess and revise the sustainability plan below. The greater the uncertainty and risk, the more often you should reassess. See Table 4 for reassessment guidance.		Type response here.

Step	Action Step	Responsible individual	Necessary resources	Desired completion date
<i>Number your steps in the approximate order they will occur.</i>	<i>Be specific and make each step discrete. Anyone should be able to pick up this document and understand what needs to happen to achieve your goal.</i>	<i>Who will ensure the action step gets taken? It does not have to be the person who will do the work, but it should be the person with the skills, authority, and time to make sure that the action step gets done.</i>	<i>Necessary resources include things like staff, permits, and materials. If you do not currently have the necessary resources, your plan should include the steps required to obtain them. It may be necessary to articulate a separate sustainability goal and plan to do so.</i>	<i>Be prepared to revise these dates as you go.</i>
1	Type response here.	Type response here.	Type response here.	Type response here.
2	Type response here.	Type response here.	Type response here.	Type response here.
3	Type response here.	Type response here.	Type response here.	Type response here.
4	Type response here.	Type response here.	Type response here.	Type response here.
5	Type response here.	Type response here.	Type response here.	Type response here.
6	Type response here.	Type response here.	Type response here.	Type response here.
7	Type response here.	Type response here.	Type response here.	Type response here.
8	Type response here.	Type response here.	Type response here.	Type response here.
	<i>Add more rows for elements specific to your coalition or partnership as needed!</i>			

V. Table 3. Sustainability Milestone Planning

	Milestone
	Sustainability goal (#5 in Table 1):
1	Type response here.
2	Type response here.
3	Type response here.
4	Type response here.
	<i>Add more rows for elements specific to your coalition or partnership as needed!</i>

VI. Table 4. Sustainability Planning Assessment Checklist

Check when complete	Prompt
<input type="checkbox"/>	Have you met the success criteria you defined in step #6 of Table 1?
<input type="checkbox"/>	Are you including individuals with relevant lived experience in the planning, processes, and activities?
<input type="checkbox"/>	Is your goal moving you closer to the outcomes you are trying to achieve? If not, consider revising your goal or developing a new goal and a new plan.
<input type="checkbox"/>	Are you leveraging your strengths?
<input type="checkbox"/>	Have you planned for all the relevant barriers that you can reasonably foresee?
<input type="checkbox"/>	Do you have all the resources you need? If not, consider whether you can incorporate obtaining them into this sustainability plan or whether you need to develop a new plan, perhaps associated with a different sustainability goal.
<input type="checkbox"/>	Have you specified what needs to happen over the next week/month/quarter to move you closer to your sustainability goal?
<input type="checkbox"/>	Have you identified the milestones in Table 3 that you are ready to begin planning to reach in Table 2?

VII. Creating Effective Communications Products

1. Define your goal. What do you want to happen because of this communication? What will be different after you have disseminated this communication to your audience? Consider your logic model or theory of change—how does this communication move you closer to your long-term outcomes?

Resource. If your communications goal is policy-focused, refer to [Addressing Social Determinants of Health through Policy: A Planning Guide for Multi-Sector Community Partnerships](#) for additional guidance. Remember that policy includes “little p”—procedures, administrative actions, and voluntary practices that affect your operations and programs.

To stimulate your thinking, consider the types of communications goals below. Do your communication goals fall into one of these categories?

Type of communication goal	Key questions
Awareness of the problem	To accomplish your larger goals, do you need to first make others aware of the problems your organization solves?
Awareness of your organization	Do you need to make others aware of the work that you do to accomplish larger goals?
Interest in your organization	Is the purpose of the communication to build interest in your activities and to build or advance a relationship?
Consideration of a proposal	Are you making a specific ask of your audience for an action for them to consider taking?
Evaluation of a proposal	Have you already made the specific ask and now want to move the conversation forward toward your desired result?
Sharing your story	Are you asking your communication audience to help you spread the word and make your case to other potential partners?

Goal	Response (examples)
What do you want to happen as a result of this communication?	<ul style="list-style-type: none"> Initiate a relationship with a new funder Demonstrate value of screening and referral services to primary care physicians Elicit support from a state representative for a Medicaid bill Raise community awareness about the importance of the built environment on public health

2. Identify audience(s). Who can make or influence the change described by your goal? Are you communicating to people who are the focus of change (recipients of the services you offer) or agents of change (people and organizations who affect the system)? How can you turn the former into the latter? Be as specific as possible in defining your audience, naming specific people to the greatest extent possible, even if it is a public communication (see Barbara persona below).

Audience(s)	Response (examples)
Who can make or influence the change described by your goal?	<ul style="list-style-type: none"> Joanne James, Community Partnerships Lead at the Smith Foundation Bill Jones, Practice Director at North Shore Primary Care Associations Sheila Walker, Chief of Staff, State Senator Williams Mother of school-age children: Audience persona is Barbara, 36 years old and a resident of Hyde Park with a son in 6th grade and a daughter in 2nd grade who worries about the amount of time her son spends playing video games; she is active on social media

3. Define the call to action. What, specifically, do you want your audience to do because of this communication? If your goal is to raise awareness, “become aware” counts as a call to action.

Tip. Keep in mind: Awareness on its own does not create change, so you should have a concrete plan for how awareness will translate into future action and change.

Call to action	Response (examples)
What do you want your audience to do?	<ul style="list-style-type: none"> • We want Joanne James to review our introductory materials and respond by agreeing to meet with us. • Bill Jones has already recognized the health value of a screening and referral program. We want him to enter into a contracting relationship with us or, if he is not the decision maker, to connect us to the decision maker for a contracting relationship. • We want Sheila Walker to convey our data and materials to State Senator Williams, and we want Senator Williams to make a public statement of support for the Medicaid bill. • We want Barbara to feel validated in her worries about her son’s video game habit and to make her aware that outdoor recreation is an alternative, but only if the spaces for it exist, so that she can be enlisted as a volunteer to support policy change in the future.

4. Describe your audience’s motivations. What is important to your audience in the context of your goal and call to action? Think about them as *people*, not just as *organizations*.

Motivations	Response (examples)
What is important to your audience in the context of your goal and call to action?	<ul style="list-style-type: none"> • Joanne James is very conscious of demonstrating the equity commitment of the Smith Foundation. • Bill Jones is responsible for the financial performance of the practice. • Sheila Walker will be responsive to anything that might improve the senator’s reelection chance. • Barbara is nostalgic for her childhood, which felt much freer than her children’s, and wants to believe that kind of freedom is still possible.

5. Identify message and format. Given your audience’s motivations, what message will move them to take the desired action? What ideas or concepts must your audience understand to be persuaded or moved to action? Messages might include personal stories, survey data, findings from the research literature, and descriptions of the problems. What format will be most compelling given the context of the communication?

Content and format	Response (examples)
Given your audience’s motivations, what messages will move them to take the desired action? What format will be most compelling given the context of the communication?	<ul style="list-style-type: none"> • For Joanne James, we should emphasize our equity commitment that matches hers, i.e., the fact that we work exclusively in low-income, majority-Black communities and partner with those residents to co-design our programs. A one-pager that describes our programs and co-creation approach, emphasizing “Nothing About Us Without Us,” will be most effective. • Given Bill Jones’s focus on financial performance, we need to demonstrate that there is financial value, not just health value, in a screening and referral program. An infographic will be the best way to communicate those hard numbers. • Personal stories and pictures that Senator Williams can use or adapt in campaign materials will be compelling to Sheila Walker. A slide deck that briefly defines the problem and our solution before telling several personal stories of families we have helped will be most effective. • Given her nostalgia for a freer childhood, Barbara is likely to be responsive to an Instagram campaign highlighting the value of public green spaces and the possibilities they offer.

Making the most of your data

The reality is that you will not always have ideal content or data for the communications product that you want to create. However, that does not mean that you should give up your communication strategy entirely! Often you can use more easily obtainable types of data, either all in one or in combination, as substitutes. To help your thinking along these lines, here is a list of different types of data you may have access to, in approximate order of easiest to most difficult to obtain:

Tip. If there is something holding you back from implementing your ideal communication strategy, such as not knowing who might be an agent of change or what their motivations might be, it could be a signal to address the limitation as part of your sustainability plan.

Figure VII.1. Making the most of your data

Category #	Type of data	Notes
1	Who you are What you do (activities) What you produce (outputs) Descriptions of the problem you are solving Research literature (for example, from Google Scholar)	All of these are relatively easy to obtain from your logic model, theory of change, or regular operations of your coalition or partnership. If that is <i>not</i> the case, obtaining these data may be a great focus for your sustainability efforts.
2	Personal stories about the people you have affected and how you have helped them Informal survey data (e.g., comment cards at an event)	Person-level data in these categories has a special power to move audiences. These two categories are closely related and take a special effort to obtain. If you do not have a repository of this type of content to use in the creation of data products, planning to obtain it may be an important component of your sustainability plan.
3	Formal survey data Outcomes	These are the most labor-intensive and expensive to obtain. They both require special technical expertise that is not feasible for all coalitions to obtain in all cases.

One of the biggest communications mismatches that coalitions and partnerships face is the need to create a communication product that ideally would use category 3 data when you do not have those data. Both coalitions and partnerships, however, do have data substitutes from categories 1 and 2 that may be more feasible to use in your communications products.

Challenging type of data to obtain	Possible substitute	Explanation	Example
Formal survey data	Personal stories and informal survey data	Survey data are valuable because they can provide a scientifically rigorous justification for a claim to truth about people, such as that residents of a community perceive a particular issue as a problem or that participants in an educational program value what they are learning. Personal stories and informal survey data also make data-driven claims about people, just without the same scientifically rigorous claim to truth. In some cases, that claim to truth is critical and this substitution will not work. But often what will move an audience are simply data about what people believe or how they are experiencing some aspect of their lives, even if the data do not derive from a formal, rigorous survey.	A coalition wants to communicate to a politician the value that community residents place on a new park so that she will support other built environment initiatives. There is no time or money to field a full survey. Instead, a coalition places a staff member at the park on two afternoons and has them conduct brief, informal interviews with park users about how their quality of life has improved since the park opened. These stories then form the basis of the communication strategy to the politician.
Outcomes	Activities + outputs + research literature	Outcomes backed by a valid evaluation process are often the gold standard for your audiences, especially funders. But outcomes are hard to generate without access to very robust data, evaluation expertise, and a matched control group. In the absence of outcome data, a tight narrative about what you have done (activities) and what you have produced (outputs) in combination with evidence from the research literature that those activities and outputs reliably produce desired outcomes can be a compelling substitute. Hint: Lean on your logic model, which should define your activities and outputs and be informed by the research literature on how those activities and outputs lead to desired outcomes.	A coalition wants to demonstrate to a funder that their program connecting young adults to elderly residents at a Medicaid-funded nursing home for weekly Puzzle Nights is increasing the residents' social connectedness, leading to improved health outcomes. However, they do not have access to the residents' health data. Instead, they craft a message that describes how many Puzzle Nights they have held, how many residents have participated, and findings from a study that group activities such as Puzzle Night decrease rates of depression and improve quality of life among older adults.

Goal	Response
What do you want to happen as a result of this communication?	Type response here.
Audience(s)	Response
Who can make or influence the change described by your goal?	Type response here.
Call to action	Response
What do you want your audience to do?	Type response here.
Motivations	Response
What is important to your audience in the context of your goal and call to action?	Type response here.
Content and format	Response
Given your audience's motivations, what messages will move them to take the desired action? What format will be most compelling given the context of the communication?	Type response here.

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Let's Progress Together. For questions or comments regarding the Sustainability Planning Guide or to discuss how Mathematica might support your SDOH journey, contact Ben Fischer (BFischer@mathematica-mpr.com) or Jennifer Dickey (JDickey@mathematica-mpr.com).