



Trinity Health TCI Cross-site Training

Sustainability Planning – Part 2

May 14, 2026
12:30 PM – 2:00 PM EST





A Reflection on the Common Good

— “ —

A story is told of an old farmer whose corn crop consistently won first prize at the state fair. Bright yellow, juicy and sweet, the corn became a legend. After a decade-long streak of winning, a reporter interviewed the farmer about his strategy. The humble man surprised everyone by admitting his method was to share his best seed corn with his neighbors. “How can you afford to share your best seed corn with the same people you compete against every year?” the reporter asked. The farmer replied, “Don’t you know? The wind picks up pollen from the ripening corn and swirls it from field to field. If my neighbors grow inferior corn, cross-pollination will steadily degrade the quality of my fields. If I am to grow good corn, I must help my neighbors grow good corn.”

AS CATHOLIC HEALTH CARE,
WE WORK
FOR THE COMMON GOOD

Today’s individualist culture struggles with the notion of the common good, which requires sacrifice from those who have a surplus in order to ensure that those who are vulnerable are able to gain what they need to fully flourish.

What is good, must be common to all.

TCI TA Providers and National Evaluators

- Jessie Jones, MPHI
- Laurie Call, IPHI
- Daniel Lanford, GHPC
- Olivia Halls, GHPC
- Christopher Parker, GHPC
- Lauren Stites, GHPC
- Evelyn Yang, GHPC

Learning Objectives

Participants will be able to:

1

Describe the requirements of the TCI Sustainability Plan

2

Use evaluation data in sustainability planning.

3

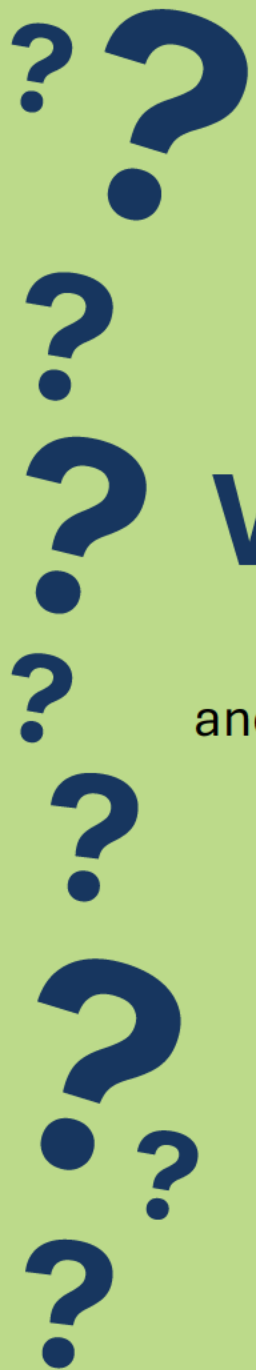
List potential strategies to identify resources to support ongoing work.

Agenda

- TCI Announcements
- Evaluation Update
- Training Introduction
- Sustainability Plan Requirements and Best Practice Guidance
- Using Evaluation Data in Sustainability Planning
 - Reflection and Large Group Discussion
- Potential Strategies to Identify Resources
 - Reflection and Large Group Discussion
- Closing

Group Agreements

- Stay present and actively participate.
- All teach, all learn.
- Step up, step back.
- Accept that activity will not be complete.



Warm-up

Please answer the 3
anonymous poll questions.

Poll Questions

1. How far along are you with completing your sustainability plan?
2. What sections of the plan do you still have questions about?
3. How confident are you feeling about implementing your proposed plan?



Sustainability Plan Requirements and Best Practice Guidance

Jessie Jones & Chris Parker

Sustainability

“The ability to maintain activities and benefits over time.”

Schell, S.F., Luke, D.A., Schooley, M.W. et al. Public health program capacity for sustainability: a new framework. Implementation Sci 8, 15 (2013). <https://doi.org/10.1186/1748-5908-8-15>

Sustainability Frameworks

Georgia Health Policy Center Sustainability Framework

The Sustainability Framework describes seven elements for sustainability:

1. Strategic Purpose
2. Contextual Relevance
3. Practical Alignment
4. Data Utilization
5. Active Collaboration
6. Effective Communication
7. Visionary Leadership

Rural Health Information Hub (RHH) Key Considerations for Sustainability

RHH presents considerations for sustainability, including:

- Identify opportunities to leverage/build upon existing priorities/activities.
- Identify diverse funding opportunities.
- Implement data-driven decision-making processes.
- Identify existing and potential partners to continue the work.

National Association for County and City Health Officials (NACCHO) Guide – Understanding and Planning for Sustainability

NACCHO presents seven domains of sustainability, including:

1. Community and organizational partnerships
2. Funding
3. Governance
4. Staffing
5. Ongoing assessment and continuous quality improvement
6. Strategic Communications
7. Policy

Common Elements

- Committed/aligned leadership
- Leveraging aligned opportunities
- Community and organizational partnerships/collaboration
- Diverse funding sources
- Data-driven decision making
- Strategic Communication

Developing a Sustainability Plan: Principles and Process

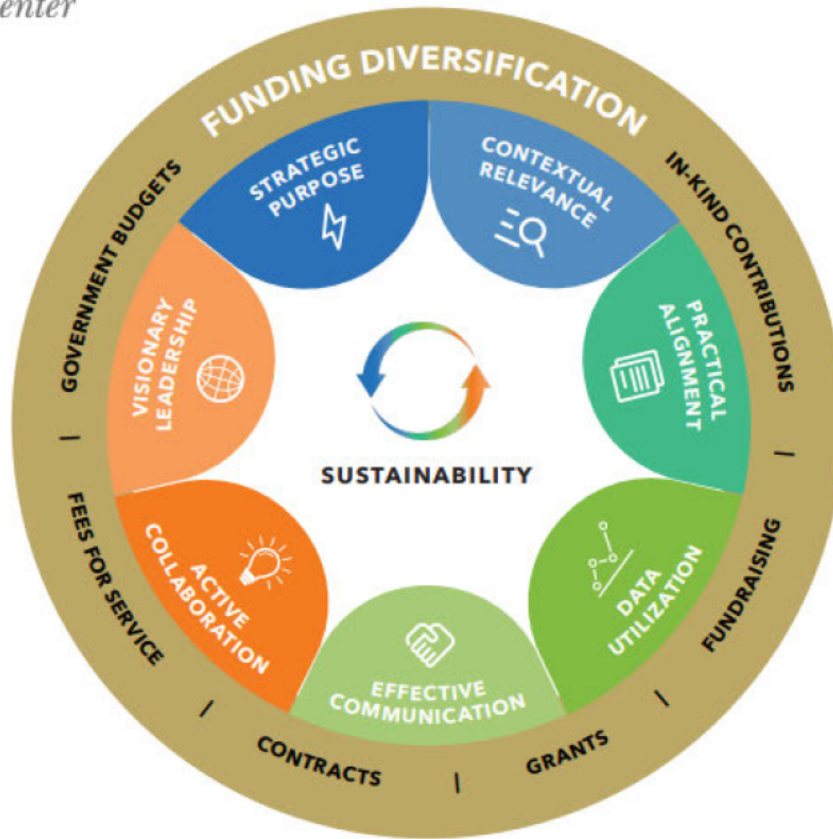
- Guiding Principles:
 - Joint and inclusive process with partner engagement throughout
 - Prioritize best outcomes for the community
 - Adaptable and actionable
 - Feasible and practical for implementation

High-Level Process

- Seek TA if needed (ASAP)
- Identify and involve appropriate participants
- Select domains or frameworks
- Develop plan to meet minimum requirements
- Submit to Trinity Health by May 30th

Minimum Requirements

- Demonstrate visionary leadership, active collaboration, data utilization, and an accountability structure
- Include goals, key actions, strategies/methods/measures for demonstrating success
- Submit as a PDF



Sustainability means that programs and services continue because they are valued and draw support and resources.

Are you positioned for sustainability?

Organizations with the highest potential for sustainability keep their focus on:

- Strategic Purpose**
 The collaborative or organization has a clearly defined, shared vision that guides its efforts and aligns with the mission and values of participating organizations.
- Contextual Relevance**
 The collaborative or organization adapts its efforts to the sociocultural, political, and economic environment, as well as trends and emerging issues.
- Practical Alignment**
 The collaborative or organization implements initiatives that provide a relevant solution in response to a need and demand expressed by the community.
- Data Utilization**
 Organizations collect, analyze, and use data to assess implementation and demonstrate the value and impact of efforts.
- Effective Communication**
 Critical information is exchanged among participating organizations and other stakeholders to create awareness and share successes of the initiative.
- Active Collaboration**
 The collaborative or organization brings together key stakeholders needed to address the issue with all sharing responsibility, risks, and rewards of their efforts.
- Visionary Leadership**
 Leaders provide strategic direction by inspiring others to achieve desired outcomes and directing resources to support sustainability of efforts.
- Funding Diversification**
 The collaborative or organization maintains and grows its efforts through a range of fiscal resources and supports generated with a purposeful and ongoing focus on sustainability planning.



Using Evaluation Data in Sustainability Planning

Olivia Halls & Evelyn Yang

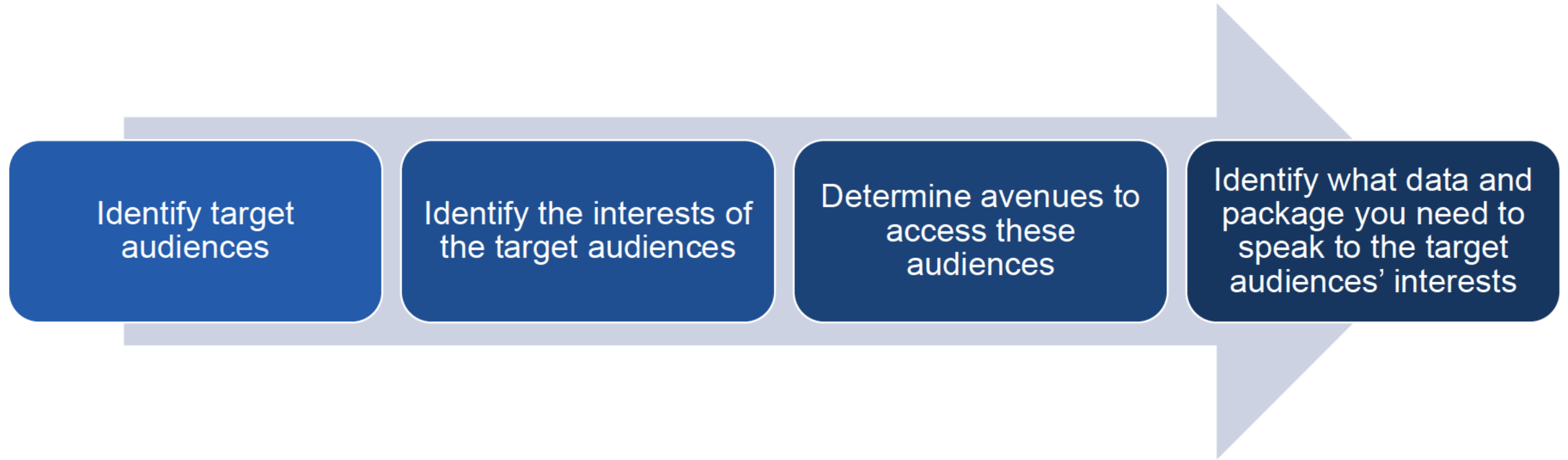
Evaluation Data Uses for Sustainability Planning

- Demonstrate value and impact to attract additional partners and funding that will support the continuation of site activities over the long term
- Use data to...
 - demonstrate actions you are taking to achieve your goals (e.g., in CAP, evaluation plan)
 - communicate success through site-specific measures or indicators of success

Evaluation Data Uses for Sustainability Planning

- **Demonstrate actions you are taking to achieve your goals (e.g., in CAP, evaluation plan)**
 - Partnerships built over the initiative
 - Progress that affirms the strategies connected to your goals
- **Communicate success**
 - Value to the community
 - Policy changes achieved
 - Improvements to community conditions related to prioritized need
 - Demonstrate social return on investment

Process for Leveraging Data for Sustainability



GHPC Sustainability Framework 2.0

Potential audiences to consider using data to communicate with, given the services you provide and the value you have created.

SERVICES PROVIDED + VALUE CREATED	Funding Source		Funding Type	
DIRECT SERVICES Access for vulnerable populations Improved individual health outcomes	- Public payers - Private payers	- Self-pay by individuals - Providers, sponsored organizations	- Fee for service - Capitation - Shared savings - Institutionalization	- In-kind contributions - Local, state, and federal government budgets
CARE COORDINATION SERVICES Improved quality of care and improved individual health outcomes	- Public payers - Private payers	Providers, sponsored organizations	- Shared savings - Fee for service - Contracts	- Pathways HUB - Institutionalization - Local, state, and federal government budgets
PREVENTIVE CARE, SURVEILLANCE, PREPAREDNESS PROGRAMS Improved public health	- Federal agencies - State public health agencies	Local public health agencies	- Grants - Contracts	- Institutionalization - Local, state, and federal government budgets
SOCIAL SERVICE PROGRAMS Financial assistance and related support services for vulnerable individuals and families to address social determinants of health	- State agencies and programs - Accountable care organizations and Accountable communities of/ for health - Local wellness funds	Public payers	- Contracts - Shared savings - Local, state, and federal government budgets	- Grants - Institutionalization - Medicaid waivers
TRAINING AND EDUCATION PROGRAMS General public awareness or targeted education Increased workforce capacity	- Federal agencies - Public payers - Private payers	- State public health agencies - Local public health agencies	- Fee to participate - Fee for service - Institutionalization	- In-kind contributions - Fundraising - Local, state, and federal government budgets
EVENTS General public awareness, screening, or targeted education	- Local and civic organizations - Business	Community members	Fundraising	- Sponsorship - Institutionalization

Evaluation data can tell a part of your story...

The (Potential) Audience	The Story	Local Evaluation Data	National Evaluation Data
- Philanthropic organizations - Public/private payers	Synergistic and impactful partnerships have formed between community organizations and agencies to benefit the community by addressing the prioritized need(s). Additional partnerships are needed to achieve the desired impact.	- Data demonstrating assets and needs to implement strategies and goals set forth in the CAP - Annual site-level report (most significant changes, outcomes achieved)	- TCI Collaborative Reflection Tool (TCRT): “Notable shifts or findings (2024 to 2025 by domain)” in TCRT Results Summary. <u>Key domains</u>: Collaboration, Vision, Shared Power, Sustainability, Individual Perspectives - Annual evaluation report (findings from interviews, TCRT, site reports)
- Local and civic organizations - Local business - Community members - Local/state public health agencies - Philanthropic organizations - Public/private payers	The collaborative’s work is resulting in positive change through community-driven solutions, and there is a justifiable need for the work to continue: - Demonstrated need - Substantial community awareness of prioritized need resulting from collaborative’s efforts - Demonstrated impact (e.g., proven value to residents most impacted by prioritized need)	- Root Cause Analysis process and outcomes - Annual site-level report (most significant changes, outcomes achieved) - Evidence of positive engagement, outcomes, and feedback from community engagement (community events, resident leadership, advisory boards). - Stories of change achieved related to the prioritized need(s).	- TCRT, key domains: Collaboration, Shared Power, Plan for Action, PSE Change to Advance Racial Equity, Sustainability, Overall (#1) - Annual evaluation report (findings from interviews, TCRT, site reports)

Identify Data Assets and Gaps

Story	Local Evaluation Data	National Evaluation Data	State-level or National Data	Other Data
The program or initiative has proven value and impact in the community and must be sustained.	Data you have or need to justify the continuation of your activities			



Evaluation

A Sustainability Strategy

Deacon Dzierzawski

Storytelling

Evaluation as a sustainability strategy is the demonstration you know what you are doing and why you are doing it. Resulting in the ability to show what you do provides a good return on investment

How

Through consistent documentation, using common language, of activities and aligned to the intended outcome(s). Verified by a third party...

Actions are nothing unless they are done with intent and purpose...Tied to an intended outcome.

Results

Data becomes truth, as a result of the verification process, and actions are able to be replicated to repeat the result.

Actions to outcomes are NOT Cause and Effect... BUT Contribution.

What does this mean?



What does this mean?

Showing the ability to mobilize volunteers, in hours, value provided, in the community helps make the case that people believe in the work and it is credible. This is only done when we monetize community mobilization

Showing how many people we serve demonstrates how services reach into the community and the ability to connect one-on-one.

What does this mean?

Connecting messaging to reach/impressions provides insight into the ability be an influencer, opinion maker

Showing contributions to changing policies, programs and practices brings focus on the organization's ability to create lasting changes to the environments that people live.

Coalition for a Healthy Community Oxford Area

1999-2009 Foundation

- Town/gown coalition formed
- Focused on alcohol and tobacco policy change
- Community engagement initiatives launched
- Single funding source
- 3 primary outcomes established (one general, two specific)

2009-2012 School Integration

- Coalition adopted by school system
- Coordinator also served as School Wellness Coordinator
- Expanded into health eating initiatives
- 4 primary outcomes (one general, three specific)

Coalition for a Healthy Community Oxford Area

2012-2015 Capacity Building and Evaluation

- Began comprehensive evaluation efforts
- Secured State of Ohio funding
- Added support from United Way, City of Oxford and Hospital
- Increased focus on community engagement
- 6 primary outcomes established (one general, five specific)

Impact

- 357 unique actions aimed at their six outcomes (47% were aimed at a specific outcome)
- 9,979 people served face to face
- 309,932 people reached through media efforts
- 914 volunteer hours with a value of \$20,387.83
- \$800.80 of in-kind investment
- \$19,038 in cash investment
- 30 improvements to organizational capacity
- 77 actions aimed at systems change (20 actual system/policy changes)

Coalition for a Healthy Community Oxford Area

2015-2019 Community Expansion

- Asked to help improve conditions and resident engagement at local HUD development
- Began aligning work to community health needs assessment
- 11 primary outcomes established (one general, 10 specific)

Impact

- 1,459 unique actions aimed at stated outcomes (58.9% aimed at specific outcome)
- 35,227 people served face to face
- 3,245,141 people reached through media efforts
- 3,767 volunteer hours with a value of \$89,693.72
- \$49,275.43 of in-kind investment
- \$265,845.23 in cash investment
- 90 improvements to organizational capacity
- 402 actions aimed at systems change (109 actual system/policy changes)

Coalition for a Healthy Community Oxford Area

2019-2022 Partnership Growth

- Asked to be part of HRSA consortium
- Additional funding through the HRSA consortium
- Additional funding from the local community health foundation
- 14 outcomes (one general, 13 specific)

Impact

- 1,811 unique actions aimed at stated outcomes (80.8% aimed at a specific outcome)
- 12,697 people served face to face
- 1,473,897 people reach through media efforts
- 3,965 volunteer hours with a value of \$107,063.79
- \$17,234.80 of in-kind investment
- \$117,525.01 in cash investment
- 142 improvements to organizational capacity
- 518 actions aimed at systems change (91 specific system/policy changes)

Coalition for a Healthy Community Oxford Area

2022-Present Strategic Leadership and Systems Change

- Asked by regional health foundation to increase youth advocacy efforts
- Adopted by local community health foundation as a key partner to fulfill community health needs assessment
- 15 outcomes (2 general and 13 specific)

Impact

- 2,853 unique actions aimed at stated outcomes (78.9% aimed at a specific outcome)
- 45,274 people served face to face
- 1,307,030 people reached through media efforts
- 6,371 volunteer hours with a value of \$208,253.61
- \$16,195.18 of in-kind investment
- \$186,972.50 in cash investment
- 161 improvements in organizational capacity
- 681 efforts aimed at systems change (106 specific system/policy changes)

Coalition for a Healthy Community Oxford Area

Role of Evaluation in Organizational Expansion

Evaluation played a central role in the coalition's evolution from a small, grant-funded initiative into a broad community health leadership organization.

Demonstrated measurable impact

Beginning in 2012, the coalition implemented comprehensive evaluation processes that tracked actions, outcomes, community reach, volunteer contributions, and systems changes. This created credible evidence of effectiveness for partners and funders.

Strengthened funding opportunities

The ability to document results helped secure new investments from the State of Ohio, United Way, hospitals, local government, HRSA partnerships, and community health foundations. Evaluation data validated that resources were producing meaningful community outcomes.

Coalition for a Healthy Community Oxford Area

Supported strategic growth

Evaluation allowed the organization to move beyond alcohol and tobacco prevention into broader health priorities such as healthy eating, housing conditions, youth advocacy, and community health initiatives. Data helped identify emerging needs and guide expansion into new focus areas.

Improved organizational capacity

Tracking organizational improvements and systems-change efforts helped the coalition refine operations, strengthen partnerships, and increase efficiency over time. Documented capacity gains reflected increasing organizational maturity.

Group Brainstorm

- *How can you use either your local data or the data GHPC has collected to tell your story?*
- *What other opportunities do you have to leverage data in your sustainability plan?*



Potential Strategies to Identify Resources

Jessie Jones and Laurie Call

The Funding Navigation Process



For more information, see the GHPC [Guide to Funding Navigation](#):
Training and tools to design and sustain equity advancing investments.

5 Step Funding Navigation Process

STEP 1	VISION Explain how the future could look through investment and use of funds. What opportunity for impact or improvement do you see? What would fill that need?	
STEP 2	PEOPLE AND PRIORITIES Ensure the right people, including community members, are engaged in conversations and that community needs, priorities, and existing efforts are reflected in the vision. What relationships need strengthening?	
STEP 3	FUNDING LANDSCAPE ANALYSIS Learn about resources in the system, build relationships that may help access those resources, and identify diverse funds for your portfolio. What relationships do you need to build or strengthen?	
STEP 4	STRATEGY Plan your pursuit of funding opportunities and how to communicate with the collaborative and the broader community about the effort. How will you describe your work and the desired future to different audiences? Who on your team will do what by when?	
STEP 5	INNOVATION IN ACTION Bring together community priorities, partners, principles, and funding to move from planning to success and sustainability. Take advantage of available tools and resources. How can you leverage successes for additional opportunities?	

Community Benefits Agreements (CBAs)

A **Community Benefits Agreement (CBA)** is a legally binding contract between a developer (or project sponsor) and community groups that outlines specific benefits the community will receive in exchange for supporting a development project.

Purpose

- Ensure development projects deliver local benefits
- Address community concerns early in the planning process
- Build support and reduce opposition or delays

Common features

- Job creation and local hiring commitments
- Affordable housing requirements
- Environmental protections
- Infrastructure or public space improvements
- Community funding or programs

Identifying CBA Opportunities

- Tracking city planning and zoning board agendas
- Monitoring rezoning applications and permitting processes
- Following publicly funded or incentivized developments
- Engaging early in neighborhoods experiencing redevelopment pressure
- Building coalitions with labor, housing, and environmental groups

Early engagement is critical because CBAs depend on leverage during approval stages.

How a CBA is Established

01

Project
announcement

02

Community
organizing

03

Negotiation
process

04

Agreement
drafting

05

Formal signing

06

Monitoring &
enforcement

Elements of Effective CBAs

1. Community interests are well represented.
2. The CBA process is transparent, inclusive, and accessible.
3. Concrete, meaningful benefits deliver what community needs.
4. Clearly defined enforcement mechanisms ensure developer accountability.

CBA Resources

- [Will That New Development Benefit Your Community: The People's Guide to Community Benefits Agreements & Alternatives](#), City Bureau, February 2022.
- Pursuing Housing Justice: Interventions for Impact: [Community Benefit Agreements](#), Urban Institute
- [Which Community Benefits Agreements Really Delivered?](#), Shelterforce: Essential Reporting on Affordable Housing, August 31, 2021.
- [Common Challenges in Negotiating Community Benefit Agreements and How to Avoid Them](#), Partnership for Working Families and Community Benefits Law Center, January 2016.

Group Discussion

- What ideas do you have to identify resources?

Q and A

TA Available

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- Any sites that need it may ask for TA.
- Even if the TA provider is not assigned to your site, you may reach out to us for assistance.
- If we can't help you, we will work to find someone who can.

Training Feedback - Poll

- Please complete the training evaluation.

Closing