de Beaumont

Building Healthier Communities Together

A Practical Workbook for Multisector Partnerships





Suggested citation:

Building Healthier Communities Together: A Practical Workbook for Multisector Partnerships. Bethesda, MD: Prepared for the de Beaumont Foundation by the Institute for Health and Productivity Studies, Johns Hopkins Bloomberg School of Public Health; September 2026.

de Beaumont

Table of Contents

01 Introduction 2

02 Initiative Taking 3
Stakeholder Mapping Template 3
Sample Agenda Template 4

03 Strategic Governance 5
Draft Memorandum of Understanding (MOU) Template 5
Roles Checklist 6
Partnership Responsibilities Matrix 7

04 Thoughtful Goal Setting 8
Needs Assessment Worksheet 8
Logic Model Template 9

05 Shared Measurement 10
Indicator Library 10
Defining Metrics Worksheet 11
Example Completed Metrics Worksheet 12
Indicator Table Template 13
Evaluation Plan Templates 14
Structure 14
Process 15
Outcomes 16
List of Public Data Sources 17

06 Effective Communication 19
Value Proposition Worksheet 19

07 Sustainable Financing 20
Budget Worksheet Template 20
Funding Options and Grant Listing Websites 22

01 Introduction

This workbook was developed following Catalyzing Public Health and Private Partnerships: A Multi-Sector Convening, held Dec. 2-3, 2025. The convening brought together key voices from public health, businesses, and local chambers of commerce to share their experiences and strategies for establishing healthy communities across the U.S. through multisector partnership. The guide describes the following six steps for building effective multisector partnerships:

1. Initiative-taking
   - Getting the ball rolling to initiate connections with potential partners and mapping out shared interests and common goals.
2. Strategic governance
   - Defining roles and building shared leadership by putting in place a structure for effective engagement, such as a memorandum of understanding.
3. Thoughtful goal setting
   - Starting with what matters to everyone by conducting a needs assessment, focusing on common problems, and mapping a shared approach to reaching goals using the S.M.A.R.T. goals framework.
4. Shared measurement
   - Tracking what matters most to all key stakeholders for each stage of the partnership. Data are needed to identify community health needs and challenges, build a business case, set goals, monitor progress, and track impact.
5. Effective communications
   - Tailoring language to focus on local, action-oriented community impacts.
6. Sustainable financing
   - Thinking beyond grants to fund the initiatives developed by the partnership over the long term.

When businesses, public health agencies, hospitals, schools, the faith community, nonprofits, and local government work together and follow the six steps above, they can accomplish what no single institution can achieve on its own. This workbook includes tools, worksheets, templates, and links to other useful resources that can help you put the steps described in the guide into practice.

How to Use this Workbook

Use the examples and templates in this workbook to establish, operationalize, and sustain your partnerships.

02 Initiative Taking

Stakeholder Mapping Template

Use the form below to list all the potential stakeholders in your community with whom you could potentially partner. Ahead of time, or in conversations with each stakeholder listed, fill in the fields to determine what they can bring to the table, their interests/goals, and limitations. Once filled in, this document can help you map out the best mix of stakeholders to partner with that can bring a balance of the needed expertise (e.g., health policy, community issues/needs, analytics), resources (e.g., time, personnel, data, financial), and identified shared goals and interests.

Stakeholders	Assets	Levers	Incentives	Constraints
E.g., Local Chambers of Commerce	Large membership base	Has trust of members; can gain broad consensus	Strengthening the economy for local business members	Limited financial resources Risk of conflicts of interest

Sample Agenda Template

Once you have gathered all the stakeholders willing to come to the table, it is time to schedule that first meeting to get the ball rolling. Below is a sample agenda format with some key topics to include. It's important to know the readiness and attitude of your potential partners to determine which topics can be discussed at the initial meeting and which topics should be discussed at future meetings.

<<Name of Partnership Initiative>>
Agenda

I. Welcome/Introductions

II. Problem Statement
   a. Present the community issue(s) at hand and how they affect each of the stakeholders involved

III. Data Snapshot
   a. Share data trends on the pressing community health issues
      i. Provide benchmarking data where available (compared to other counties, the state, and/or national level data)
      ii. Provide a breakdown by demographics, as relevant (e.g., to highlight particular community subgroups that may be more vulnerable)

IV. Vision
   a. Present the overarching draft vision statement and goals for the partnership
      i. Include some potential specific short-term, mid-term, and long-term goals for consideration

V. Shared Governance Proposal
   a. Discuss the roles and responsibilities the partnership needs fulfilled, and what each stakeholder is willing and able to take on
   b. Use the Roles Checklist and Partner Responsibility Matrix templates to guide the discussion

VI. Next Steps
   a. Identify a cadence for regular meetings (e.g., monthly or quarterly)
   b. List out action steps and specific individuals to take the lead on tasks such as preparing:
      i. A Memorandum of Understanding (if desired and needed)
      ii. Confirming and documenting the roles and responsibilities for each partner
      iii. A draft roadmap outlining steps for formalizing the partnership, implementation plan, and goals

03 Strategic Governance

Draft Memorandum of Understanding (MOU) Template

Below is a sample template you can use to get started on writing up an MOU for the partnership. Add additional details as appropriate. Not all partnerships require an MOU, but having one upfront can help establish clear expectations, commitments, and accountability for all stakeholders.

<<Name of Partnership Initiative>>
Memorandum of Understanding

Purpose of the Partnership: The purpose of this agreement is to establish a partnership among [List all partners] to collaboratively improve [specific health outcomes, e.g., pediatric asthma rates] in [Community Name] by leveraging collective resources, expertise, and community engagement.

Expected Duration: This MOU shall become effective on [Start Date] and will remain in effect for a period of [Number] years. This agreement may be renewed or extended upon mutual written consent of all parties.

Each Partner's Contributions: Partner A agrees to [e.g., provide clinical staff and data analysis]. Partner B agrees to [e.g., provide funding, community outreach, and venue space]. [Continue listing all other partners and their contributions] These contributions are in-kind or financial, as detailed in Exhibit A.

Data-Sharing Agreements: All parties agree to share data related to [program metrics] in compliance with all applicable federal, state, and local privacy laws, including HIPAA. Data shared will be used strictly for evaluating community health improvements.

Decision-Making Procedures: Key decisions regarding project implementation will be made by a joint steering committee, composed of representatives from each organization. Decisions require consensus; in the event of a dispute, [Process for dispute resolution, e.g., a meeting between directors] will be initiated.

Non-Binding Clause: This MOU is a statement of intent and does not create legally binding obligations, nor does it establish a formal partnership or joint venture.

Termination Clause: Any party may terminate this agreement with [Number] days' written notice to the group.

Roles Checklist

Below is a list of the various key roles that a partnership needs. This list is not exhaustive. Modify as appropriate. When identifying partnership organizations, consider which role(s) they can best serve.

Partnership Role	Role Description	Proposed Entity or Individual
Convener	Leads the facilitation of all meetings and events, and brings in new collaborators	
Communication Management	Leads internal communication needs (e.g., emails, newsletters, distribution of meeting materials)	
Data Management	Leads the gathering of data, analysis, and reporting of progress and outcomes	
Public Relations	Creates and disseminates public-facing communications, coordinates engagement of community leaders on key events	
Fundraising	Identifies potential sponsors, grant opportunities, volunteer support, and in-kind contributions	
Implementation Management	Coordinates activities to execute the initiative	
Other:		

Partnership Responsibilities Matrix

Use this matrix to map out each stakeholder organization, their respective lead personnel/contact person, and key responsibilities.

Partners	Personnel	Key Responsibilities	Note
E.g., Local Public Health Dept	Jane Doe	• Convener (organizer of meetings) • Provides access to community health data	• Has one PT staffer to assist with convening activities

04 Thoughtful Goal Setting

Needs Assessment Worksheet

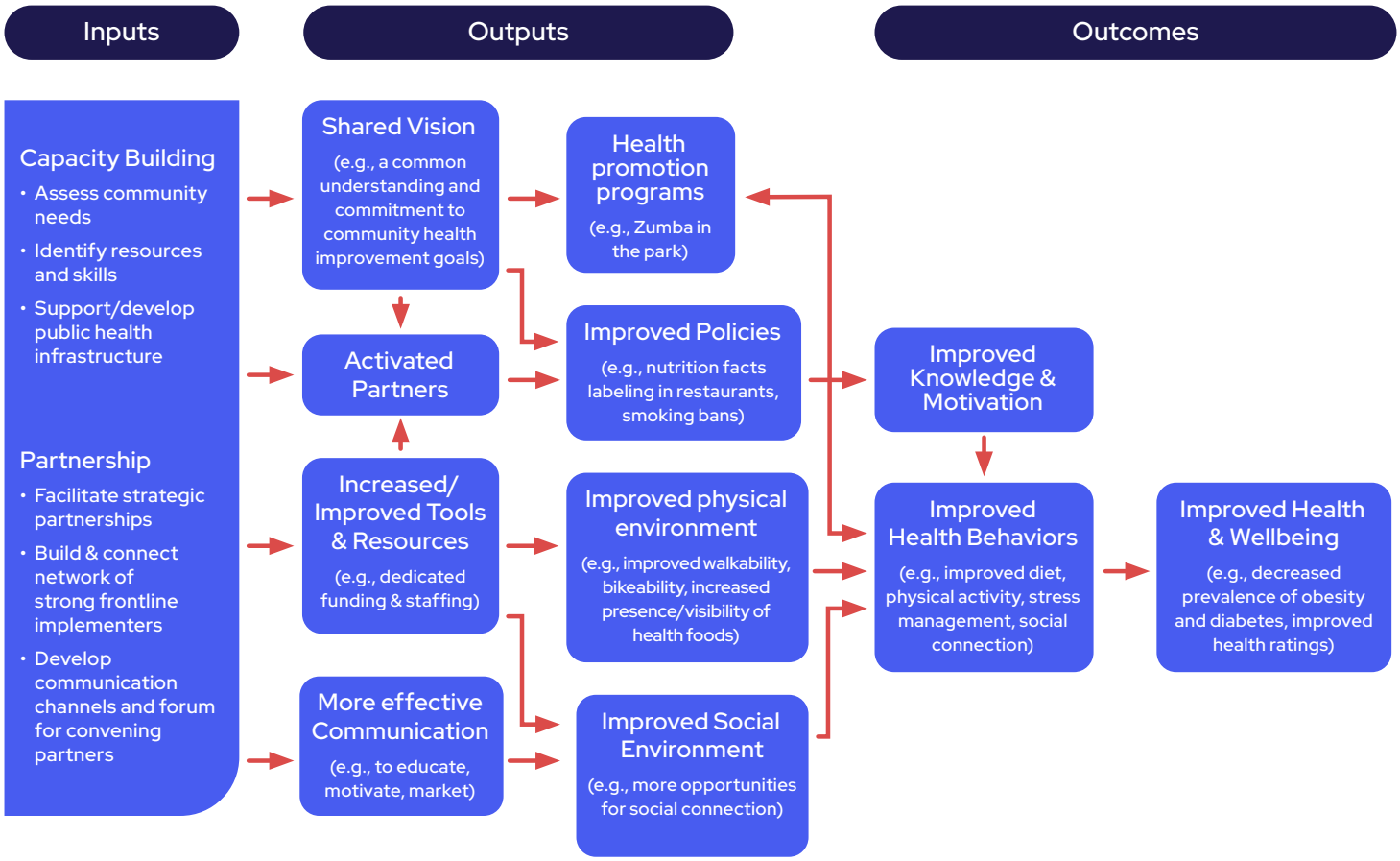
Use this worksheet to map out the pressing community health issues (using current local community data). Then prioritize the top issues to address that inform the partnership's vision, mission, goals, and resources for short-, mid-, and long-term planning. Once you have identified the top issues, use the Structure Worksheet in the Evaluation Plan Templates section to drill down on the details for inventorying your assets, resources, data sources, and other needs to launch the initiative.

Assessment and Planning Worksheet		
Community Health Issues *What we know*	So What? *Why does it matter?* *To whom does it matter?*	Now What? *What are the next steps?*
E.g., High obesity rates, above both state and national averages of 3% and 5%, respectively.	Associated with high levels of chronic conditions. Data show that those with more chronic conditions have higher medical expenses and are more often absent from work, affecting productivity. This affects both the individual and employers.	Conduct a needs assessment to determine factors that may be contributing to local obesity rates (e.g., access to healthy foods, places for physical activity/ recreation, access to affordable healthcare) and identify the gaps and opportunities for engagement.

Logic Model Template

A logic model is used to plan, describe, manage, communicate, and evaluate a program by illustrating the relationship between resources, activities, and intended outcomes. It helps ensure that program efforts are aligned with desired results and improves stakeholder engagement.

Below is an example of a Logic Model you can use as a model to create one that fits your initiative. The **inputs** are what the partnership brings to the table to facilitate the **outputs** (near-term actions and initiatives) that ultimately lead to the **outcomes** of interest (from awareness to behavior change, to improved health). Modify each box (adding details or additional boxes) as appropriate.



05 Shared Measurement

Indicator Library

Below is a list of domains and related metrics. **Domains** represent your big-picture goals. **Outcome metrics** are associated with your objectives.

Select a small number of topics that align with your short-, mid-, and long-term goals/outcomes of interest. Then drill down to define the specific metrics that are most relevant and accessible.



Defining Metrics Worksheet

Once you have selected your outcome metric(s) for each domain, the next step is to define them for measurement and identify your data sources. Each metric may have multiple indicators. Select the most relevant and accessible. Below is a worksheet to map your selected domains, specific metrics of interest within those domains, and definitions of each chosen indicator. An example completed worksheet is included below for illustration purposes.

Blank Worksheet			
Healthy Community Domain	Outcome Category	Indicator Definition	Data Source
<<Domain 1>>	[Metric 1]	[Indicator 1]	
	[Metric 2]	[Indicator 2a]	
		[Indicator 2b]	
<<Domain 2>>	[Metric 3]	[Indicator 3]	
	[Metric 4]	[Indicator 4a]	
		[Indicator 4b]	
<<Domain 3>>	[Metric 5]	[Indicator 5]	
	[Metric 6]	[Indicator 6]	
	[Metric 7]	[Indicator 7]	

Example Completed Metrics Worksheet			
Healthy Community Domain	Outcome Category	Indicator Definition	Data Source
Economic Vibrancy	Income inequality	Ratio of household income at the 80th percentile to income at the 20th percentile	American Community Survey
	Poverty	Percentage of employed residents whose incomes are below the poverty line	U.S. Bureau of Labor Statistics
		Percentage of children living in households whose incomes are below the poverty line	U.S. Bureau of Labor Statistics
	Employment	Percentage of adult residents who are employed.	U.S. Bureau of Labor Statistics
		Number of part-time employees for every 100 full-time employees.	U.S. Bureau of Labor Statistics
		Unemployment rate: Percentage of the labor force (aged 16+) not working and actively seeking a job	U.S. Bureau of Labor Statistics
	Population growth	Net migration: How many people are moving into the community vs. out of the community, adjusted for any fluctuations caused by births or deaths	U.S. Census Bureau

Indicator Table Template

For each planned initiative or intervention, there are different markers of completion and success. Use this Indicator Table Template to outline, at a high level, how you will measure each phase to determine if you have completed that step and achieved the target goal for that step. Use the Evaluation Plan Templates to construct more detailed elements of measuring progress and success.

Blank Template			
	Definition	Goal	Measurement
Structure	Was it built?		
Process	Was it used?		
Outcome	Did it work?		

Example Completed Template			
	Definition	Goal	Measurement
Structure	Was it built?	E.g., Refurbish 3 neighborhood playgrounds, which are currently underused due to broken parts, and have no picnic areas	All 3 playgrounds renovated within the planned timeframe
Process	Was it used?	E.g., Residents are aware of the renovations and use the playgrounds	Survey residents to capture self-report information about awareness, use of, and satisfaction with the renovated playgrounds
Outcome	Did it work?	E.g., Increase the percentage of resident children meeting physical activity guidelines by 10% (defined as at least 60 minutes or more a day of moderate to high intensity)	Survey average physical activity before and after renovations

Evaluation Plan Templates

The following worksheets are designed to serve as a guide for cataloging and organizing the elements (data, resources, needs) for developing your measurement and evaluation roadmap to support your initiative. The evaluation framework consists of three parts: Structure, Process, and Outcomes.

Structure

The purpose is to assess the gaps and needs at the community level by taking an inventory of what currently exists. Then make or update your strategic plan. Ask yourself these questions and fill out the worksheet with your answers.

- What are the community's needs and interests? Think about current health risks, current use of services/resources, and disparities.
- Are effective evidence-based programs, policies, and environmental supports in place for improving or maintaining the health and well-being of the community?
- What resources exist in the community that may impact opportunities, success, and sustainability of initiatives? Which are currently being used?
- Who are all the stakeholders? Who is at the table and who is not? Who should be brought to the table?

Structure Evaluation		
What we know/have:	What we need/want:	What can we obtain/do now vs. planning for mid- and long-term steps?

Process

The purpose of process evaluation is to monitor program implementation. This includes an assessment of program quality, program completion, extent of participation, and reach. Use this worksheet to map out how you plan to measure each process element. This includes planning out *when* (e.g., six months after launch), *how often* (e.g., semi-annually), and *how* (e.g., by survey) to collect the data.

Process Evaluation		
Quality and Completion	**Extent of Participation**	**Reach**
To what degree are the initiatives being implemented as planned?	To what degree are the target community members aware of, engaged in, and satisfied with the initiatives?	What is the participation or completion rate for each of the initiative elements?
When:	When:	When:
How often:	How often:	How often:
How:	How:	How:

Outcomes

Outcomes evaluation addresses the impact question. Did your initiative hit its targeted goals? Use the following worksheet to define the short-, mid-, and long-term targeted goals. Be as specific as possible.

Outcomes Evaluation			
Period	Metrics	Indicator Definition	Target Goal
E.g., Short-term (1-2 years)	Employment	Percentage of adult residents who are employed	Increase the percentage of adult employment in our community by 3% per year
Short-term (1-2 years)			
Mid-term (3-5 years)			
Long-term (6-10 years)			

List of Public Data Sources[1]

Name	Organization	Resource Category	Notes
County Health Rankings and Roadmaps	County Health Rankings	Rankings	More than 30 measures help communities understand how healthy their residents are today (health outcomes) and what will impact their health in the future (health factors).
Well Being in the Nation (WIN) Measures	Well Being in the Nation Network	Report	Shows connections between social conditions, health, community, and well-being.
Mapping Tools	Build Healthy Places Network	Toolkit	Demonstrates disparities and need, provides baseline data, document trends, and more. A collection of mapping tools for community development and health.
States in Detail	Trust for America's Health	Database	Provides access to data for critical health indicators in each state or territory.
Tools and Analysis	Integrated Benefits Institute	Toolkit	Tools include benchmarking, cost estimator of health on productivity and disability diagnosis analysis.
The Best Places to Live in the U.S.	U.S. News Best Places	Rankings	The 150 most populous metro areas are analyzed to rank the best places to live.
Best Places to Work: Healthiest Companies in America	Greatist.com	Report	Truly stellar businesses are identified by researching companies and analyzing data on work-related health and wellbeing metrics.

[1] This list was modified from the following source: Roemer EC, Myburgh I, Kent K B, & Goetzel RZ. (2022, July 12). Building a foundation for a business and health accountability dashboard. *White Paper prepared with funding from the CDC Foundation.*

Name	Organization	Resource Category	Notes
Behavioral Risk Factor Surveillance System	Centers for Disease Control and Prevention	Database	National system collecting state level data on health-related risk behaviors, chronic health conditions, and use of preventive services.
Best Cities for Jobs	Wallet Hub	Rankings	The report analyses 182 cities across two dimensions: job market and socioeconomics, evaluated by 32 metrics. Final weighted averages are calculated and used to rank-order the sample.
Emerging Housing Markets Index	WSJ/Realtor.com	Rankings	Reviewed data for the 300 most populous core-based statistical areas, as measured by the U.S. Census Bureau. The overall methodology explores two main areas: real-estate markets and economic health.
Performance Measurement in Economic Development	Matthew Fischer & Assoc Inc.	Report	A summary of the literature on Performance Measurement in Economic Development provides guidance to economic developers for the creation of their own metrics.
2019 Quality of Living Survey	Mercer	Report	Mercer evaluated local living conditions in more than 450 cities surveyed worldwide.
Healthiest Communities	U.S. News	Rankings	Interactive tools that can measure how the dozens of social factors assessed in the Healthiest Communities analysis are tied to health.

06 Effective Communication

Value Proposition Worksheet

To better attract funders and/or partners, it is important to be clear about what you are about and what value you bring to the table. A value proposition has four components:

1. **What** you offer
2. For **whom**
3. What **benefits** they can expect
4. Why you are the **right provider/partner**

Use the table below to identify your what, whom, benefits, and whys, then craft your value proposition statement tailored to your audience.

What you offer	For whom	What benefits they can expect	Why you are the right provider/partner
E.g., Cross-country data	Community leaders	Ability to focus outreach efforts	Have a shared data platform and analytic team
Value proposition statement: *We pull together **cross-country data**, so **community leaders** know **where to focus their outreach**, powered by our **shared data platform and analytic team**.*			
Value proposition statement:			

Once you have drafted your statement, do a pulse check and ask yourself these questions:

1. Would they understand this in **10 seconds**?
2. Does it tell them the **services you offer** and not just the impact?
3. Does it clearly **name a benefit** they care about?
4. Does it tell them what is **unique** about you?
5. Is it **compelling**?

If the answer is no to any of these questions, go back to the drawing board.

07 Sustainable Financing

Budget Worksheet Template

Use this budget template to determine the monetary needs for the partnership to function in the first year. Below are sample categories of potential expenditure.

Category	Purpose	Notes	Amount
1. Personnel & Staffing	e.g., at least one part-time dedicated staff member to maintain continuity on communications with partners		
2. Operational Materials	e.g., educational materials for the nutrition campaign	Potential in-kind contribution from Partner X	
3. Measurement & Evaluation	e.g., community surveys, data analysis, tracking, dashboards	Send out a request for proposal to X, Y, Z	
4. Marketing/ Communication	e.g., public relations activities		
5. Capital & Infrastructure	e.g., software licenses		
6. Other (list):			
		Total	$

Further Reading:

Beyond the Grant: A Sustainable Financing Workbook, developed by the Rippel Foundation, offers practical, user-friendly tools to answer common financing questions and develop action plans for moving beyond the grant.

Blank Template:

Category	Purpose	Notes	Amount
		Total	$

Funding Options and Grant Listing Websites

Specialized and Health-Focused Foundations	
Robert Wood Johnson Foundation	Focuses on building a "Culture of Health" in communities.
W.K. Kellogg Foundation	Focuses on community equity and education.
The Kresge Foundation	Invests in economic and social improvement in underserved communities.
American Heart Association Social Impact Fund	Funds community-based health interventions.
Ardmore Institute of Health	Funds innovation to advance community support for whole person care and whole health through accessibility in healthy choices.
Gates Foundation	Funds organizations to achieve measurable impact against poverty, disease, and health inequity.

Foundation and Private Grant Search Platforms (Targeted/Nonprofit)	
Instrumentl	A paid subscription tool to find active community health and healthcare access grants.
Candid/Foundation Directory	An extensive database of foundations, grants, and recipient information.
AAMC Center for Health Justice	A curated list of funding opportunities addressing community health equity and safety.
The Grant Portal	Online database of grants, private foundations, and grant recipients.
Walmart Foundation Community Grant Program	Supports local initiatives in communities served by Walmart.

Federal and Government Grant Portals (Broad Scope)	
Grants.gov	The centralized database for all federal grant opportunities, including CDC, SAMHSA, and HRSA.
HRSA (Health Resources & Services Administration)	Focuses on health centers and underserved populations.
Rural Health Information Hub (RHIhub)	A comprehensive database for funding specifically targeted at rural community health projects.
USDA Rural Development	Provides grants and loans for community facilities and infrastructure improvement.

de Beaumont

