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A RIPPEL INITIATIVE

# for developing a **TOOLKIT** Value Proposition Narrative

Making a Case That Compels Stakeholders  
to Get Involved in Regional Efforts to  
Transform Health and Well-being

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# Developing a Value Proposition Narrative

Making a Case That Compels Stakeholders to Get Involved  
in Regional Efforts to Transform Health and Well-being

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A value proposition is a positioning statement that explains WHAT benefits you, your colleagues, and your multisector partnership or organization provide to WHOM, and HOW you do it UNIQUELY well. It builds on a shared vision of a desired future, defining your unique qualifications to contribute to the vision’s realization. Together, a shared vision and value proposition make a value proposition narrative.

# Introduction

## What is a Value Proposition Narrative and Why do You Need One?

A value proposition is a positioning statement that explains WHAT benefits you, your colleagues, and your multisector partnership or organization provide to WHOM, and HOW you do it UNIQUELY well<sup>1</sup>. It builds on a shared vision for a desired future, defining your unique qualifications to contribute to the vision's realization. Together, a shared vision and value proposition make a value proposition narrative.

Articulating a value proposition narrative will help your stakeholders answer the question, “Why should we be part of an effort to transform health and well-being in our region?” Participating in the acts of building a shared vision for the future and understanding the value you provide in helping to get there enables stakeholders to work together as collaborators, investors, or in some other way. Many health improvement efforts focus on moral persuasion or a commitment to public health best practices to encourage involvement from others. While these may be important arguments, they overlook the reality that your work to transform the system that produces health and well-being in your region provides tangible value—including but not limited to economic value—to a wide range of stakeholders.

**Three questions can help identify a value proposition narrative that has a strong chance of convincing stakeholders there is value in getting involved in the effort:**

- 1. Does it make a logical, reasoned, and specific argument that engages the “head?”**
- 2. Does it trigger connection and passion and engage the “heart?”**
- 3. Does it motivate action and engage the “hands?”**

This toolkit will guide you and your colleagues through the process of developing a compelling value proposition narrative that inspires stakeholders not already engaged in the effort to join you in creating a healthy future together. For purposes of this toolkit, “you” refers to representatives from one or more collaborative groups (e.g., multisector partnerships) that are working together to improve the health of an entire region. “You” could also be those running independent organizations, programs, or initiatives (whether or not you are working on a region-wide effort).

Articulating a compelling value proposition narrative is a group activity. A value proposition narrative for a collaborative group or an organization, program, or initiative should be articulated by the full range of those who have a stake. Working through this toolkit as a group will increase your capacity to:

- Develop a shared vision for the desired future state of your system and why change is needed
- Provide opportunities for stakeholders to align around that vision
- Build trust
- Attract new allies
- Appreciate the consequences of action or inaction
- Choose strategies that will help you and other stakeholders have the highest potential impact in achieving the shared vision.
- Convince investors to support your efforts

## TIP

Whether you have articulated it or not, there is a de facto value proposition in place for the work you do. Using the Value Proposition Narrative Assessment Toolkit (see Appendix 1 on page 26) will allow you to assess against key criteria the narrative already in use in your organization, collaborative, or region.

<sup>1</sup> <https://www.forbes.com/sites/michaelskok/2013/06/14/4-steps-to-building-a-compelling-value-proposition/#6d101b4b4695>

# How to Use This Toolkit

## Who should use this toolkit

This toolkit is intended to be used by those leading the process—a core leadership team or staff of one or more collaborative groups (e.g., multisector partnerships) that are working together to transform the health of an entire region, or by those running independent organizations, programs, or initiatives (whether or not you are working on a region-wide effort). In most cases, regardless of the organization or collaborative group for which you are crafting your value proposition narrative, it is a good idea for the leadership team to involve a wide range and number of stakeholders in the process to build ownership and commitment. Ideally, stakeholders will actively support what comes out of this process, working to realize the shared vision and to use the value proposition narrative to get more and more stakeholders involved.

## Timing

If you are working on a value proposition narrative for a single organization, program, or initiative, the toolkit can be completed over a couple of meetings with 8-16 hours of staff time. If you are working on a value proposition narrative for a collaborative group transforming the system that produces health and well-being in your region, you should plan an appropriate length of time, and likely multiple meetings, to include leadership from all participating multisector partnerships as well as mixed groups of individual stakeholders (ideally representing a wide range of sectors that are and are not formally involved) from across the region. In addition, your value proposition narrative will be strengthened if you can draw on the aspirations of residents (those who live and work in the region who are not professionally involved in the work of transforming health).

It's likely that developing a refined value proposition narrative for your region will require work over several months to convene the appropriate stakeholders, including residents, and collaboratively work through the toolkit's resources. As you are working, remember that the value proposition narrative is iterative. When sharing your narrative with stakeholders you will get feedback about how it can be strengthened. Additionally, the process of developing and sharing your value proposition narrative will likely help determine the best strategies to reach your vision, strengthen your approaches to financing your work, and understand how you can most effectively work as a cross-sector team to steward change. Developments in one or more of these areas could in turn encourage you to further refine your value proposition narrative.

## Process

The resources in this toolkit are arranged in a logical order—guiding you through articulating your shared vision, assessing your current reality, determining the value of closing the gap between the current reality and desired future state, identifying the unique value you add, and crafting these components into a narrative. That said, you don't need to use any of the elements in order. You can use this toolkit flexibly, diving in where you need to do the most work. If you have already articulated a shared vision, for example, you may be able to skip that section. If you have already defined a value proposition narrative, you may wish to start with the Value Proposition Narrative Assessment Toolkit in Appendix 1 and let your findings about your existing narrative guide where you dig in.

In each section of this toolkit, you will find information about the components of a value proposition narrative, including criteria, key messages, and questions to consider in your work; pitfalls you may encounter along the way; and additional resources that will be especially useful for those of you looking to craft a value proposition narrative for your region. If you have recently completed a highly participatory health assessment process, it may offer a good starting point for creating a draft that can be shared with participants for their review and feedback. Many partnerships or networks, though, will need to put in place a process for engaging your team and stakeholders in developing your value proposition narrative.

## We recommend the following process:

1. Name the effort for which you need a value proposition narrative. You can choose to craft a value proposition narrative for an independent organization, program, or initiative or for one or more collaborative groups (e.g., multisector partnerships) that are working together to improve the health of a region.
2. Identify the stakeholders, including residents, who should participate in the process.
3. Read through the full toolkit to understand the components of a strong value proposition narrative and, if you would find it helpful, use Appendix 1 to assess what you have already completed in the past and determine whether or not updates are needed.
4. When you are ready to begin work:
  - a. Print copies of the Overview: Four Components of a Value Proposition Narrative (page 6) and the Value Proposition Component Tracker (page 7) for all participants. The overview will help everyone understand the important components of the process they are committing to, as well as what ought to be included to ensure each component, and the overall value proposition narrative that they make up, is well constructed. Participants can use the tracker to document the statements and summaries they create as they work through the process. (As an alternative, the core leadership team heading up the process can provide a written recap of all components developed every time the participants move on to a next step.)
  - b. Work through the toolkit section by section (using only what you need). You may find it useful to do this over the course of several meetings. For each section, ask all participants to read the introductory context and questions to consider and draft that component of the value proposition narrative. Discuss what each stakeholder wrote and work together to develop a collective draft.
5. Once you have worked together to draft the value proposition narrative, ask all stakeholders to practice conveying it to others through storytelling (you'll understand better what this means when you read the section about crafting a narrative). They should practice over several weeks.
6. After you have had an opportunity to practice telling the story of your value proposition narrative, reconvene the group to discuss their experiences and work together to strengthen it based on feedback. You will want to periodically revisit your value proposition narrative to ensure that it continues to speak to your stakeholders. You might want to add more details about your proposed plans, their costs, and the net value that makes your efforts worthwhile.
7. Consider how to use the value proposition narrative to drive action among stakeholders and begin to make and implement plans using [other ReThink Health tools](#).

# Overview: Four Components of a Value Proposition Narrative

Components of a Value Proposition	Components Should Meet These Criteria	Useful Messages for Each Component
<p><b>COMPONENT 1</b> <b>Shared Vision</b></p> <p>A picture of or statement about what it will look like when your aspirations are realized</p>	<ul style="list-style-type: none"> <li>• <b>Clear:</b> Stated aspirations are concise and memorable; they are easy to understand, communicate, and imagine actually happening.</li> <li>• <b>Compelling:</b> The desired future state creates an emotional pull because it represents a significant, desirable accomplishment.</li> <li>• <b>Shared:</b> Resident voices and a wide range of stakeholder interests are represented. There is widespread awareness of stated aspirations, and an intended outcome is greater ownership and equity.</li> <li>• <b>Transformational:</b> The aim is to change the system in ways that generate progressively greater value to stakeholders over time, rather than simply adjusting certain parts to get marginally better results.</li> </ul>	<ul style="list-style-type: none"> <li>• There is a possibility for the future that would better reflect the things we care about and our values.</li> <li>• It is possible to achieve. We already see progress happening today. (Include stories of hope.)</li> </ul>
<p><b>COMPONENT 2</b> <b>Current Reality</b></p> <p>A clear-eyed assessment of historical and current performance, as well as projected performance if things stay as they are</p>	<ul style="list-style-type: none"> <li>• <b>Accurate:</b> Current results and trends are substantiated through verifiable facts from multiple data sources.</li> <li>• <b>Rigorous:</b> The analysis uses sound methods.</li> <li>• <b>Comprehensive:</b> The statement of reality delves deeper to uncover causes beyond the presenting symptoms.</li> <li>• <b>Reflective:</b> Explanations for current results include lessons learned from past efforts.</li> </ul>	<ul style="list-style-type: none"> <li>• The jury is in: We've made some progress.</li> <li>• But, if we do nothing more, our best result is treading water: things won't get better, and we have reason to believe that they could get worse.</li> <li>• There is a cost for inaction.</li> <li>• No one is to blame. The system, designed for another time and problem, has produced and will continue to produce these results. And, as the world continues to change, we must change with it.</li> </ul>
<p><b>COMPONENT 3</b> <b>Value of Closing the Gap</b></p> <p>A qualitative and quantitative summary of the benefits and costs of the proposed course of action</p>	<ul style="list-style-type: none"> <li>• <b>Relevant:</b> The value conveys a clear intersection with stakeholder interests.</li> <li>• <b>Investable:</b> The value of closing the gap between current reality and desired future state (shared vision) presents an attractive business case by communicating a credible path to achieve specific returns.</li> </ul>	<ul style="list-style-type: none"> <li>• There are costs to change, but there are more benefits if we can achieve the vision.</li> <li>• Taking action is the smartest thing to do because it produces more value for all of us. Its impact goes far beyond what our group alone focuses on.</li> </ul>
<p><b>COMPONENT 4</b> <b>Unique Value You Add</b></p> <p>A positioning statement that explains WHAT benefit you provide for WHOM, and HOW you do it UNIQUELY well</p>	<ul style="list-style-type: none"> <li>• <b>Capable:</b> You have the skills to deliver on the benefits.</li> <li>• <b>Credible:</b> You have the experience, networks, authority, and reputation to deliver on the benefits.</li> </ul>	<ul style="list-style-type: none"> <li>• Our organization has a strong history—we have experience, results, and tested relationships.</li> <li>• We have strong ties to the community, policy makers, and funders.</li> <li>• We bring together fierce competitors for the good of the community.</li> <li>• We have a good understanding of a complex system and hold a long-term view about what's possible and what's needed to achieve results.</li> </ul>
<p><b>Four components make up a value proposition narrative.</b></p>		
<p><b>A strong value proposition narrative</b> will help your stakeholders answer the question, “Why should we be part of an effort to transform health and well-being in our region?” It will convince them of the tangible value of being involved.</p>	<p>The four components, together, make up the value proposition narrative, which engages the:</p> <ul style="list-style-type: none"> <li>• <b>Head:</b> It makes a rational, reasoned, and specific argument with an appropriate risk/reward ratio.</li> <li>• <b>Heart:</b> It triggers connection and passion.</li> <li>• <b>Hands:</b> It motivates action.</li> </ul>	<ul style="list-style-type: none"> <li>• There is something in this for all of us.</li> <li>• Closing the gap is a team effort.</li> <li>• Here's how you can make this happen. Will you be part of the solution?</li> </ul>

# Value Proposition Narrative: Component Tracker

Use this sheet to keep track of the statements and summaries your team creates as you work through the toolkit.

Components of a Value Proposition	Statements and Summaries
<p><b>COMPONENT 1</b> <b>Shared Vision</b></p> <p>A picture of or statement about what it will look like when your aspirations are realized</p>	
<p><b>COMPONENT 2</b> <b>Current Reality</b></p> <p>A clear-eyed assessment of historical and current performance, as well as projected performance if things stay as they are</p>	
<p><b>COMPONENT 3</b> <b>Value of Closing the Gap</b></p> <p>A qualitative and quantitative summary of the benefits and costs of the proposed course of action</p>	
<p><b>COMPONENT 4</b> <b>Unique Value You Add</b></p> <p>A positioning statement that explains WHAT benefit you provide for WHOM, and HOW you do it UNIQUELY well</p>	

# COMPONENT 1

## Articulating Your Shared Vision

Crafting a compelling value proposition narrative begins with articulating a shared vision for your region. We define vision as a picture of or statement about what it would look like if your aspirations for the health and well-being of your region were realized. Your vision should offer a positive future, rather than be limited to a reaction to an actual or feared nightmare. This section will help you create a rich picture of the future you imagine, identify themes in that vision, and identify the shared values that underlie your vision for the future.

Your vision should be both aspirational and attainable. If a vision is not sufficiently aspirational, it won't motivate people to action. If it is not sufficiently attainable, stakeholders are likely to disengage because the vision feels hopelessly unrealistic. Some stakeholders may have less tolerance for an ambitious vision than others, and you may have to focus on shorter-term goals that can be embraced by all at first in order to develop confidence that bigger goals are possible. You can always broaden your shared vision later.

Since you are planning to use this shared vision to develop a value proposition for your regional effort, it is important that your vision be shared by organizations and stakeholders across your region. The resources in this section include a tool to help you craft a shared vision.

Components of a Value Proposition	Components Should Meet These Criteria	Useful Messages for Each Component
<p><b>COMPONENT 1 Shared Vision</b></p> <p>A picture of or statement about what it will look like when your aspirations are realized</p>	<ul style="list-style-type: none"> <li>• <b>Clear:</b> Stated aspirations are concise and memorable; they are easy to understand, communicate, and imagine actually happening.</li> <li>• <b>Compelling:</b> The desired future state creates an emotional pull because it represents a significant, desirable accomplishment.</li> <li>• <b>Shared:</b> Resident voices and a wide range of stakeholder interests are represented. There is widespread awareness of stated aspirations, and an intended outcome is greater ownership and equity.</li> <li>• <b>Transformational:</b> The aim is to change the system in ways that generate progressively greater value to stakeholders over time, rather than simply adjusting certain parts to get marginally better results.</li> </ul>	<ul style="list-style-type: none"> <li>• There is a possibility for the future that would better reflect the things we care about and our values.</li> <li>• It is possible to achieve. We already see progress happening today. (Include stories of hope.)</li> </ul>

### Questions to Consider

- When you imagine your community in 20-25 years, what do you see and hear that captures your dream for health in your community? Which of those visions are shared across stakeholders in your region? If you are creating a value proposition narrative for a collaborative group or an organization, program, or initiative, what long-term changes will result if the effort is widely successful?
- What values underlie the vision you have identified?
- Are your stated aspirations concise and memorable? A clear vision is easy to understand and communicate.
- Would achieving your aspirations represent a significant accomplishment? Does it make a case for transformation rather than for small improvements that will lead to marginally better results? Can you and other stakeholders in your region imagine it being realized?
- To what extent have you represented the voices of residents and the interests of organizations across the region?

## Possible Pitfalls and Tips for Avoiding Them

Pitfalls	Tips
The desired future is a compromise based on what seems feasible and, thus, falls short of what you really want.	To avoid compromise, hold the vision, but set intermediate milestones, the first of which should be deemed feasible by almost everyone. The second should be considered feasible by a majority, and so on. This helps maintain an ambitious and attainable vision and enhances credibility.
The vision is vague, abstract, and/or lacks stories of hope.	Make the vision rich and specific. Tell a story! Add characters with names and anecdotes that are specific and rich in detail. Be vivid in your description of the future and highlight true, exceptional cases from the present that you expect to be ordinary in the future.
The vision is precise but lacks meaning.	Put a face to the numbers or use social math (e.g., talk about how many people will enjoy a specific number of additional years of retirement or time with their grandchildren). This will have more resonance than quoting the total number of years of life gained for the entire population.
Some don't support the vision.	Inquire about what they value and want to see carried forward into the future. Imagine your shared vision as a diamond with many facets. Find out what inspires those who don't support the vision and consider whether it is a legitimate facet.
The rallying cry is only against, not for, something.	Be clear about what you are advocating for and be sure you articulate this in a positive light (e.g., if pregnant moms stop smoking, many more healthy babies will be born at term every year and live healthier lives).
The focus is on doing something, not on what that will accomplish.	If you are committed to a process, acknowledge that and name the result the process is meant to deliver.
The vision is seen as the job of someone else, and you are waiting for them to share it.	Tell them how you understand their vision, giving them the benefit of the doubt. Share your own vision, asking how everyone can move ahead.
The vision is seen as impossible by critical stakeholders.	Acknowledge the value of skepticism and share your stories of hope—the evidence that, in some ways, the vision is visible now.

## Additional Resources

There are many tools and activities that can guide groups like yours through the development of a shared vision. For an example of a more formal approach to developing a shared vision, the group exercise called, “Creating a Shared Vision for Health and Well-Being” begins on the next page. [ReThink Health’s Negotiating a Well-Being Portfolio Exercise](#) might also be useful. It allows you to explore how to shift the regional mix of policies, programs, and practices to better produce health and well-being in the region.

## GROUP EXERCISE

# Creating a Shared Vision for Health & Well-being

**Overview:** This exercise will help identify a shared vision for health and well-being in your region.

### Objectives

- Create a rich picture of the imagined future
- Identify themes in this vision

**Time Required:** 1.5–2.5 hours (sample agenda follows), depending on the size of your group

**Users:** One or more collaborative groups (e.g., multisector partnerships) or independent organizations, programs, or initiatives (whether or not you are working on a region-wide effort). Any number of users can participate.

**Preparation:** Identify a session host and a facilitator. The host, who should be from the organization or group that has invited stakeholders to participate in the exercise, should describe why they have brought everyone together and introduce the facilitator. The facilitator should lead the exercise discussion. The facilitator (and anyone helping with the exercise) should read the “Introduction” and “Articulating Your Shared Vision” sections of the Value Proposition Narrative Toolkit to prepare. As stated in the introduction, participants should understand that completing this exercise is only the first step in completing a value proposition narrative, and what the criteria are for a strong vision. All participants should be given the “Overview: Four Components of a Value Proposition Narrative” (page 6) and the “Value Proposition Narrative Component Tracker” (page 7).

Note: This type of session is often a part of a larger planning and strategy process. For example, it may be follow-up from a health needs assessment and preceding a health improvement planning process. Or it could launch a round of organizational strategic planning. Both the host and the facilitator should take care to put the exercise in context.

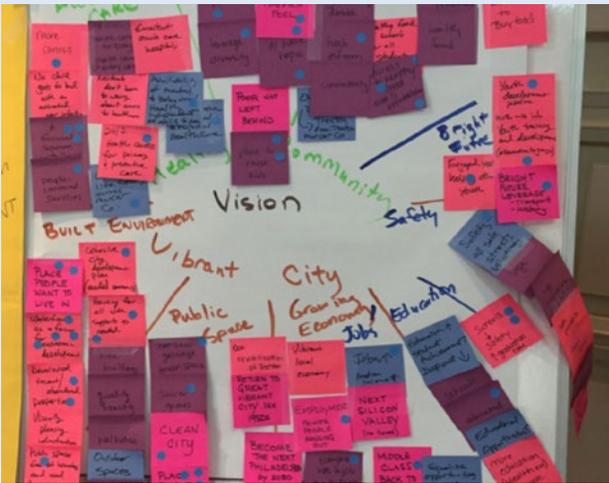
### Supplies

- 2” square Post-it notes (20 sheets per participant) in a range of colors
- Markers (one per participant)
- Large “white board” wall or walls covered with butcher paper or overlapping flip chart pages for grouping Post-its and writing themes.
- Large “web” with lines (See Appendix 2; can be hand-drawn if need be)

## SAMPLE AGENDA | Creating a Shared Vision for Health and Well-being

ITEM	TIME	AGENDA ITEM
Welcome	5 Minutes	<p><b>Session host should:</b></p> <ul style="list-style-type: none"> <li>• Review purpose of session,</li> <li>• Make a connection to related work that has already been done,</li> <li>• Highlight what comes next, and</li> <li>• Introduce facilitator.</li> </ul>
Introduction	5 Minutes	<p><b>Led by facilitator</b></p> <ul style="list-style-type: none"> <li>• Describe the tension inherent in any strong vision: being realistic is important, but let's dream together, building on what we care about.</li> <li>• Provide an overview of what's planned for the session and clarify how this vision exercise fits into the process of building a Value Proposition Narrative.</li> <li>• Clarify that, while we all care about how to improve health, today we want to focus on the WHY—what's driving us and why it matters.</li> </ul>
Visualization	5 Minutes	<p><b>Led by facilitator</b></p> <p>Ask participants to sit in a comfortable position, take a few deep breaths, close their eyes or look away from others and...</p> <ul style="list-style-type: none"> <li>• Imagine our community in 2040: <ul style="list-style-type: none"> <li>- Go for a walk;</li> <li>- Imagine what you see, hear, and smell; and</li> <li>- Talk to people you meet (in a park, health care center, or business).</li> </ul> </li> <li>• What do you see and hear that captures your dream for health and well-being in our region?</li> </ul>
Individual Reflection	5 Minutes	<p><b>Led by facilitator</b></p> <ul style="list-style-type: none"> <li>• Use Post-its to describe what you see. Use one Post-it per item. <ul style="list-style-type: none"> <li>- Example: Everyone has a safe, healthy, and affordable place to live.</li> </ul> </li> </ul>
Small Group Exercise	20 Minutes	<p><b>Led by facilitator</b></p> <ul style="list-style-type: none"> <li>• Gather into small groups of four or five.</li> <li>• Going around the group, each person shares what's on their Post-its. As each person shares, use the butcher-papered wall to group the Post-its into themes. One person starts with one item, then others add similar items as they share.</li> </ul>
(Optional) Small Group Rotation for Groups of 40+ People	20 Minutes	<p><b>Led by facilitator</b></p> <ul style="list-style-type: none"> <li>• If the group is very large (over 40), use this time to rotate to another small group Note: This is a version of the <a href="#">World Café</a> method to increase connections among all members. Learn more at the link.</li> <li>• In small groups, each person shares themes from the clusters of items from their prior table (2 minutes each).</li> <li>• After the first group, each successive group adds its Post-its, clustering them so that all similar values are near each other (10 minutes).</li> </ul>
Large Group Exercise	20 Minutes	<p><b>Led by facilitator</b></p> <ul style="list-style-type: none"> <li>• Gather back into a large group.</li> <li>• One person from each small group shares themes from their discussion with the large group, popcorn-style around the room.</li> <li>• As the small-group sharing occurs, the facilitator writes each theme on a new Post-it (one post-it per theme). As themes are shared, the facilitator groups themes using the large "web," clustering like themes along each spoke. This continues until all of the small group themes are posted.</li> </ul> <p>Facilitator Tip: State themes in positive or neutral terms (e.g., health, not illness, life expectancy, not mortality).</p>

# SAMPLE AGENDA | Creating a Shared Vision for Health and Well-being cont.

ITEM	TIME	AGENDA ITEM
<p><b>Reflection, Part 1</b></p>	<p><b>40 Minutes</b></p>	<p><b>Led by facilitator</b></p> <ul style="list-style-type: none"> <li>Facilitator recaps themes, highlighting specific Post-its under each theme as illustrations. Typically, groups have 5-10 themes that emerge from what may be 100+ Post-its.</li> </ul>  <ul style="list-style-type: none"> <li>ASK: Are there any important themes that are missing?</li> <li>ASK: What themes do you care most about given your role in the community?</li> <li>ASK: Are there areas you can't support? Facilitator should encourage strategic, not tactical thinking. Participants may not agree with very specific examples (e.g., houses are painted in brilliant primary colors), but you probably support a variation of it (e.g., well-maintained neighborhoods with proud and engaged residents).</li> </ul> <ul style="list-style-type: none"> <li>Emphasize the importance of: <ul style="list-style-type: none"> <li>Being clear on what you care about;</li> <li>The motivating power of taking on tough challenges and having tough conversations—but the tough conversations aren't personal;</li> <li>Respecting that different facets make the vision rich;</li> <li>Understanding that it's a good thing that we all care about different facets; and</li> <li>Engaging everyone in this process and not visioning for others.</li> </ul> </li> </ul>
<p><b>Reflection, Part 2</b></p>	<p><b>15 Minutes</b></p>	<p><b>Led by facilitator</b></p> <ul style="list-style-type: none"> <li>Ask for reflections on the exercise</li> <li>Note areas that need resolution—for now, can we agree to not fully agree?</li> <li>Recap the vision <ul style="list-style-type: none"> <li>Example: In 2040, everyone has safe, affordable housing, access to healthy food and a good education, easy access to resources when in difficulty, and neighbors who provide support.</li> </ul> </li> <li>ASK: Would you choose this future? Is this what we really care about and want for the region?</li> </ul>
<p><b>Conclusion</b></p>	<p><b>5 Minutes</b></p>	<p><b>Led by facilitator</b></p> <ul style="list-style-type: none"> <li>Ask participants to take out their Value Proposition Narrative Component Tracker and write-in what they have agreed on for their shared vision statement (Component 1). Explain: "Now our work is to figure out how to get from here to there. We will do so over subsequent meetings (provide meeting dates, if possible) that explore our current reality, the gap we need to close, and how we are positioned to do so."</li> <li>Clarify for participants how stakeholders will work together moving forward to identify how we will close the gap between our currently reality and our shared vision for the future.</li> <li>Communicate when to expect notes from this session.</li> <li>Thank participants.</li> <li>Make clear how participants can give feedback on the session (via email, survey, or in some other way).</li> </ul>

## COMPONENT 2

# Assessing Your Current Reality

It is important that your value proposition narrative take into account the reality you face right now. This includes acknowledging what is working and not working in favor of your vision. And it means understanding and calculating what will happen if you continue on this path (i.e., the costs of doing nothing more).

Collectively telling the truth about where you are now requires leadership. When you take on ambitious goals, you must find ways to accurately diagnose the current state of the system so that you can better determine where there is leverage for transformation. This includes considering how your own decisions and behaviors might contribute to the performance of the system and what results you are seeing from interventions already in place.

As you construct your value proposition narrative, focus on the parts of your current reality that are most pertinent to the vision you have articulated. As much as possible, favor trends over single data points as they will provide a better reference to help you understand the underlying causes of the results you are getting. Start with the key statistics associated with each element of your vision, gathering data from stakeholders who work to achieve each element and the results they have seen from their work to date.

From there, identify why this is your current reality. There are two types of causes you should explore as you complete this analysis: 1) those embedded in the physics of the system, and 2) those that result from actions or from inaction. For example, all other things being equal, we would expect health care costs to go up as the population ages. This could be caused by the physics of the system because the cost increase is directly correlated to health care needs related to chronic illness and the frailties of age. However, increasing costs could also be caused by inaction or actions by actors in the system, such as inefficient or ineffective care (e.g., discharging surgical patients without sufficient attention to care at home). Remember as you go: these reasons for the current reality are not any single person's or institution's fault. It's easy to get into a blame game when the facts don't paint as rosy a picture as you'd like.

### Here are a few possible causes for current performance:

- Not enough effect to achieve a significant change (e.g., a program in just one school)
- A tendency to favor the urgent over the strategic (e.g., directing resources into short-term services for people experiencing homelessness, rather than addressing the long-term causes of homelessness)
- Well-intended policies or programs that have unintended consequences that thwart progress or even make things worse (e.g., a small program designed to create more opportunities for young people may cause “brain drain” if not coupled with initiatives to create more opportunities in the community)
- Current incentives or policies that are designed to keep things as they are (e.g., formerly incarcerated people can have difficulty finding legitimate work when existing policies exclude them as qualified candidates for employment due to their criminal records)

In any system, there are costs related to inaction—of continuing to do what you have always done—as well as costs related to action. Part of making a positive case to stakeholders about the value of closing the gap between the way things are and your vision is recognizing the costs of doing nothing more. Calling out such costs is one way to counter arguments that it's better not to take risks when success is uncertain: there are measurable risks related to inaction as well.

When you have worked through the Questions on page 14, record your current reality in the tracker on page 7.

Components of a Value Proposition	Components Should Meet These Criteria	Useful Messages for Each Component
<p><b>COMPONENT 2</b> <b>Current Reality</b></p> <p>A clear-eyed assessment of historical and current performance, as well as projected performance if things stay as they are</p>	<ul style="list-style-type: none"> <li>• <b>Accurate:</b> Current results and trends are substantiated through verifiable facts from multiple data sources.</li> <li>• <b>Rigorous:</b> The analysis uses sound methods.</li> <li>• <b>Comprehensive:</b> The statement of reality delves deeper to uncover causes beyond the presenting symptoms.</li> <li>• <b>Reflective:</b> Explanations for current results include lessons learned from past efforts.</li> </ul>	<ul style="list-style-type: none"> <li>• The jury is in: We've made some progress.</li> <li>• But, if we do nothing more, our best result is treading water: things won't get better, and we have reason to believe that they could get worse.</li> <li>• There is a cost for inaction.</li> <li>• No one is to blame. The system, designed for another time and problem, has produced and will continue to produce these results. And, as the world continues to change, we must change with it.</li> </ul>

## Questions to Consider

- How do your current results compare to the results you seek? Don't ignore signs of hope in your current performance.
- What are the possible causes of your current performance? Have you explored the systemic causes of your current reality, rather than focusing solely on the presenting symptoms?
- What will happen if you keep doing what you've always done? A strong analysis will include both the good results you want to preserve and the areas where you find yourself stuck or losing ground.
- How are your resources allocated currently? Will your current investment patterns achieve your vision for your community?
- Are the current trends and results you've identified substantiated by data?
- What lessons have you learned from past efforts that could be applicable here?

## Possible Pitfalls and Tips for Avoiding Them

Pitfalls	Tips
Analysis leans toward being overly positive or overly critical and/or relies on a fad.	Include the bad news and the good news. Look for balance. You might use <a href="#">appreciative inquiry</a> or similar tools to help balance an overly critical orientation.
Results are reported independent of any context or goal.	Report results in context, particularly in terms of trends over time, but also relative to other standards and your own goals.
The current reality is presented in abstract terms (e.g., percentages or incidents per thousand).	Make the current situation real. Put a face on it. Use <a href="#">social math</a> , stories, and measures that are meaningful to diverse audiences.
Results are presented without any explanation of changes.	Tell a systems story. Show how various aspects of your current reality might be related. As much as possible, take responsibility for how well-intended efforts might have had unintended consequences and may have contributed to making things worse.
Conversations about the current reality focus more on what you are planning or thinking than on what you are doing and its impact	Own the discrepancy. If true, acknowledge that you don't know what to do; indeed, that might be part of your current reality. Invite help to focus the conversations.

## Additional Resources

ReThink Health has a number of resources that can help you think through the strategic questions associated with your current reality. In particular, the [ReThink Health Dynamics Model](#) is a simulation that uses average data for the U.S. to visualize what would happen under a variety of conditions. The model includes a feature to diagnose whether current interventions will achieve the results you expect or hope for.

## COMPONENT 3

# Determining Stakeholders' Value for Closing the Gap

At the heart of crafting a compelling value proposition narrative is recognizing and articulating the total potential value if you and your colleagues succeed in closing the gap between your current reality and your vision for the future. Determining this value requires understanding the perspectives of those who have a stake in your region, initiative, organization, or program.

Stakeholders are most likely to invest in closing the gap (not just with their money, but with any type of resource or asset that might help close the gap) if they see your efforts as relevant to them. Even if many in your community seem aligned around the implicit value of working toward the vision, it is important to be aware of and acknowledge the different motivations of your stakeholders. What speaks to the head and the heart of each, from both an analytical and emotional (quantitative and qualitative) perspective? Recognizing what each stakeholder values can play a large role in determining how to describe the value each will receive from their investment—from money saved to quality of life and opportunities gained. It can also help you recognize where stakeholders might perceive little value or even a loss of value as a result of your effort. Finally, it could help you surface previously untapped allies.

When you have worked through the Questions to Consider below, and the tool on pages 17-19.

Components of a Value Proposition	Components Should Meet These Criteria	Useful Messages for Each Component
<b>COMPONENT 3 Value of Closing the Gap</b> A qualitative and quantitative summary of the benefits and costs of the proposed course of action	<ul style="list-style-type: none"><li>• <b>Relevant:</b> The value conveys a clear intersection with stakeholder interests.</li><li>• <b>Investable:</b> The value of closing the gap between current reality and desired future state (shared vision) presents an attractive business case by communicating a credible path to achieve specific returns.</li></ul>	<ul style="list-style-type: none"><li>• There are costs to change, but there are more benefits if we can achieve the vision.</li><li>• Taking action is the smartest thing to do because it produces more value for all of us. Its impact goes far beyond what our group alone focuses on.</li></ul>

### Questions to Consider

- What kind of value is most relevant to each stakeholder?
- Where is there clear intersection in the interests of your stakeholders?
- How can you communicate an attractive business case that demonstrates a credible path to achieving specific returns for each stakeholder?
- What non-financial value would result for each stakeholder if you closed (or even reduced) the gap?

## Possible Pitfalls and Tips for Avoiding Them

Pitfalls	Tips
The value is vague or abstract.	Tell a story and put a face on the value of closing the gap. Use the “stories of hope” you generated when discussing your vision. Connect the specific to the general: “If we close this gap, so many people would be affected, so much pain would be reduced/happiness increased, so much money would be saved...”
The value is vague or abstract. The description of value is complicated and/or confusing.	Tell the story with graphics and/or a metaphor. Help people identify with the numbers or dynamics through something they understand.
There is concern that the costs associated with closing the gap will exceed the value for stakeholders and/or that costs alleviated for some will accrue to others (or benefits to some mean losses to others). Or, costs are not acknowledged at all.	Be honest about the costs, but also highlight a wide range of benefits.
The value highlights benefits that are only relevant to some stakeholders and are not obviously valuable to many different stakeholders.	For each stakeholder, highlight only the relevant value. Consider whether those with less obvious gains might benefit in other ways.

## Additional Resources

Understanding your stakeholders is essential to communicating the value of closing the gap. ReThink Health’s Stakeholder Value Analysis tool (beginning on page 17) helps organizations, institutions, and programs identify what will motivate their stakeholders to be a part of, and even financially invest in, efforts to change the status quo. Completing a value analysis can help you more fully articulate the aspirations that drive your efforts, communicate the benefit of your efforts, and successfully bring a range of stakeholders and investors into your work.

## GROUP EXERCISE

# Stakeholder Value Analysis

**Overview:** This tool helps collaborative groups (e.g., multisector partnerships) or independent organizations, programs, or initiatives (whether or not you are working on a region-wide effort) identify what motivates stakeholders to pursue a shared vision and what might lead them to maintain the status quo. Completing a value analysis can help you more fully articulate the aspirations that drive your efforts, communicate the benefit of your efforts, and successfully bring a range of stakeholders and investors into your work.

### Objectives

- Systematically review what might motivate stakeholders to pursue the shared vision and what might lead them to maintain the status quo
- Enrich your value proposition narrative by adding the perspectives of multiple stakeholders
- Tailor your value proposition narrative to the interests of specific stakeholders
- Generate ideas for engagement strategies

**Time Required:** 2-hour meeting (sample agenda follows), plus preparation and follow-up

**Users:** The core leadership team of one or more collaborative groups (e.g., multisector partnerships) or independent organizations, programs, or initiatives (whether or not you are working on a region-wide effort). Any number of stakeholders can participate, though we recommend only 1-2 individuals participate on behalf of each stakeholder group.

**Preparation:** If you haven't already done so, identify a session host and a facilitator. The host, who should be from the organization or group that has invited stakeholders to participate in the exercise, should describe why they have brought everyone together and introduce the facilitator. The facilitator should lead the exercise discussion.

- Participants should read “Determining Stakeholders’ Value for Closing the Gap” on page 15 of the Value Proposition Narrative Toolkit in advance.
- Print and distribute copies of the Stakeholder Value Analysis worksheet for all meeting participants.

## SAMPLE AGENDA | Stakeholder Value Analysis

ITEM	TIME	AGENDA ITEM
Introduction	5 Minutes	<p><b>Host should:</b></p> <ul style="list-style-type: none"> <li>Review objectives and agenda</li> <li>Introduce facilitator and designate a timekeeper and a note taker</li> </ul>
Review Worksheet	5 Minutes	<p><b>Led by facilitator</b></p> <ul style="list-style-type: none"> <li>Review elements of worksheet</li> <li>Review sample list of stakeholders.</li> </ul>
Analyze Stakeholder Value	60 Minutes	<p><b>Led by facilitator</b></p> <p>List stakeholders who might value your work (see box for a list of possibilities). Add to the list of stakeholders by answering the following questions:</p> <ul style="list-style-type: none"> <li>Who has the most to gain if we achieve our health system transformation aspirations?</li> <li>Who has the most to lose?</li> <li>Who is particularly interested in change?</li> <li>Who is showing more of an interest in maintaining status quo than in working toward change?</li> </ul> <p>If there is time, complete the Value Analysis Worksheet for all of the stakeholders. If time is limited, refine the generic list to those stakeholders most central to your effort. For each stakeholder, discuss: Value/benefit(s) of closing the gap</p> <ul style="list-style-type: none"> <li>Cost(s) of closing the gap</li> <li>Value/benefit(s) of maintaining things as they are</li> <li>Cost(s) of keeping things as they are</li> <li>Make an assessment about the level of net value or benefit for your effort, from each stakeholder's point of view.</li> </ul>
Implications for Value Proposition Narrative	30 Minutes	<p><b>Led by facilitator</b></p> <p>As a group, note implications for your value proposition narrative, especially additions or refinements. Discuss:</p> <ul style="list-style-type: none"> <li>Does our effort offer sufficient benefit for key stakeholders?</li> <li>What is our level of confidence that we have a good understanding of the stakeholder perspective toward our effort?</li> <li>Are there ways our aspirations should change?</li> <li>Are there things we should highlight in the value proposition?</li> </ul>
Next Steps and Close	10 Minutes	<p><b>Led by facilitator</b></p> <ul style="list-style-type: none"> <li>Make a plan for engaging key stakeholders</li> <li>Debrief meeting</li> <li>Action items</li> </ul>



## COMPONENT 4

# Identifying the Unique Value You Add

At the heart of crafting a compelling value proposition narrative is recognizing and articulating the total potential value if you and your colleagues succeed in closing the gap between your current reality and your vision for the future. Determining this value requires understanding the perspectives of those who have a stake in your region, initiative, organization, or program.

Stakeholders are most likely to invest in closing the gap (not just with their money, but with any type of resource or asset that might help close the gap) if they see your efforts as relevant to them. Even if many in your community seem aligned around the implicit value of working toward the vision, it is important to be aware of and acknowledge the different motivations of your stakeholders. What speaks to the head and the heart of each, from both an analytical and emotional (quantitative and qualitative) perspective? Recognizing what each stakeholder values can play a large role in determining how to describe the value each will receive from their investment—from money saved to quality of life and opportunities gained. It can also help you recognize where stakeholders might perceive little value or even a loss of value as a result of your effort. Finally, it could help you surface previously untapped allies.

When you have worked through the Questions to Consider below, record the value of closing the gap in the tracker on page 7.

Components of a Value Proposition	Components Should Meet These Criteria	Useful Messages for Each Component
<b>COMPONENT 4 Unique Value You Add</b> A positioning statement that explains WHAT benefit you provide for WHOM, and HOW you do it UNIQUELY well	<ul style="list-style-type: none"><li>• <b>Capable:</b> You have the skills to deliver on the benefits.</li><li>• <b>Credible:</b> You have the experience, networks, authority, and reputation to deliver on the benefits.</li></ul>	<ul style="list-style-type: none"><li>• Our organization has a strong history—we have experience, results, and tested relationships.</li><li>• We have strong ties to the community, policy makers, and funders.</li><li>• We bring together fierce competitors for the good of the community.</li><li>• We have a good understanding of a complex system and hold a long-term view about what's possible and what's needed to achieve results.</li></ul>

### Questions to Consider

- What special skills can you and your colleagues/partners contribute to the work ahead?
- What past experiences have you all had that prepare you for this task?
- Do you have the experience, networks, authority, and reputation to help reach the vision?

## Possible Pitfalls and Tips for Avoiding Them

Pitfalls	Tips
Your case depends on the value generated and your mission assumes you can deliver—but there is no guarantee.	Claim your competencies, successes, and focus. Describe why you can deliver.
Others are more qualified.	Acknowledge that partnering is at the heart of your capabilities and that you see yourselves as stewards for the community’s resources. You will not duplicate expertise already present; you will work to bring out the best in your partners.
The future requires something different than your past strengths.	Acknowledge areas where you need to develop. Create a high-level capacity development plan. Tell stories of how you have developed needed competencies in the past.
Others oppose your efforts because they feel threatened or disrespected.	Reach out to those who might feel threatened to understand their concerns. Consider what you might do to address them and how your efforts can enhance their work.
You have not addressed your failures or challenges.	Acknowledge examples of learning and how you have incorporated them into your current efforts. Describe your ongoing learning and improvement processes.
Success seems to rely on one or two individuals.	Describe your leadership development process and how you are building “bench strength.” Be prepared to share examples of effective shared leadership across your organization, institution, program, or collaborative group.

## Additional Resources

[ReThink Health’s Identifying Your Integrative Activities Assessment Tool](#) can help you identify the roles and leadership functions you already play to help govern and manage the work happening within and across groups that are working to achieve a common purpose in a region. (Note: The integrative activities tool does not have a primary focus on roles and leadership functions regarding programmatic efforts, which are also critically important.)

## BRINGING THE COMPONENTS TOGETHER

# Conveying the Value Proposition Through Strong Narrative

Once you have articulated a shared vision, acknowledged the current reality, determined the value of closing the gap, and identified the unique value your partnership adds, you are ready to pull together these various components into a value proposition narrative you can share with others. Pulling together the outcomes from the various parts of this toolkit (as documented on your Value Proposition Narrative Components Tracker on page 7), will help you create a strong narrative. The narrative will help you use storytelling to convince stakeholders why action is needed now and why they should get involved in the work. A sample narrative is on page 24.

Those who participated in the work of this toolkit can contribute meaningfully at this stage by providing all the components and being part of narrative development, but anyone who acts as a primary voice for your institution, organization, or program must make the value proposition their own. They must help craft the narrative and practice telling the story to stakeholders as they go about their work. They should also plan to continuously revisit the value proposition narrative with staff and stakeholders to strengthen the story over time. Remember that convincing narratives:

1. Make a logical, reasoned, and specific argument that engages the “head.”
2. Trigger connection and passion to engage the “heart.”
3. Motivate action and engage the “hands.”

The following tips from Tiffany Manuel's post on The ReThinkers' Blog titled, "[Anchoring to Strengthen Your Region's Case for Systems Change](#)," may be helpful as you craft a narrative that meets these criteria. “Anchoring your case” means strategically choosing the first idea or piece of information that you share. In doing so, you take advantage of the human tendency to give the most weight to this “anchor” information when making decisions.

- **Anchor your story in shared values.** You want to lead stakeholders to think more expansively about the values that are shared by everyone at the table. When people see their own values reflected powerfully in the story, they can see why they have a stake in the effort's success and feel a greater sense of urgency and excitement around solving the problem in the way proposed by the group.
- **Anchor your story in specific aspirations, not the esoteric idea of systems change.** As you tell your story, be sure to connect your efforts to concrete aspirational outcomes you know your stakeholders long to see, such as feeling safe in their homes or having improved health outcomes. Start your story in a way that lifts those aspirations as direct or indirect outcomes of your work and reminds your potential allies of your shared goals.
- **Anchor your story by using data strategically.** Health advocates working to reduce childhood obesity might anchor a systems-level solution by pointing to the number of new parks or open spaces that would need to be created or rehabilitated to provide children with an outlet for physical activity, rather than starting with the number of obese adolescents in a community. Focusing attention on a systems-level solution from the start helps ensure that the emphasis will remain on the solution.
- **Anchor your story in optimism about solutions, rather than dwelling on the problem.** Make use of concrete examples in which systems-change efforts have netted improvements in population health and/or reduced costs. This means being especially selective in providing examples and case studies that show systems change in action. Focus on your unique approach and how your solution will help bring about change. A good body of research in the cognitive sciences consistently finds that [our brains are wired for optimism](#)—which means anchoring your story in problems makes it likely that your potential stakeholders will disengage.
- **Anchor your story in the future, not the past.** The future is something we can create together and intentionally. When people look backward, their willingness to support systems-change efforts decreases. Instead, invite stakeholders to imagine a future in which your vision is realized.

## Possible Pitfalls and Tips for Avoiding Them

Pitfalls	Tips
The story focuses on the problem or the solution rather than the vision and the value for stakeholders.	Use Tiffany Manuel's anchoring tips to make the case about why the vision matters and is in the interest of your audience.
The value proposition narrative is one dimensional, meaning it focuses on only one type of value (e.g., money, justice, or access to care).	Acknowledge the most common value stakeholders usually state as their reason for being involved and include many other values to give your narrative more strength.
The value proposition seems to benefit one stakeholder more than others.	If this is legitimate, there might be more substantive work to do to balance pain and gain. If this is a matter of perception, ask a stakeholder who might benefit more to share how the benefit will accrue and to make the case for it to be this way (the stakeholder might make a convincing case).

### Additional Resources

ReThink Health has a number of resources that may be useful as you craft a narrative from the components of your value proposition. If you wish to dig deeper, you can explore the [ReThink Health Public Narrative Toolkit](#), which helps you harness the power of storytelling to motivate others to join you in action. You may also find the [full blog post](#) by Tiffany Manuel useful as you strengthen your region's case for systems change.

## EXAMPLE

# Value Proposition Narrative

Component	Story
<p><b>Vision</b></p> <p>A picture or statement of what it will look like when your aspirations are realized</p>	<p>Our community and health system help every child born now to live a healthy, productive life. Our community is thriving—it is a good place to live and it attracts investment by employers. We make choices in our community after having considered their broad impacts on health. We watch for inequities and disparities and actively seek to address them. We balance spending so that we address urgent needs as efficiently as possible, while investing in the conditions that reinforce health and well-being.</p>
<p><b>Reality: Current Results and Trends</b></p> <p>An assessment of historical and current performance</p>	<p>There is a significant gap in health outcomes correlated with zip code. Access to health and health care affect educational outcomes, which, in turn, affect employment opportunities, neighborhood safety, and adverse childhood experiences—and the cycle continues.</p> <p>Our efforts have produced mixed results. Efforts to increase access to care have lowered emergency services and acute episodes. Other efforts succeed temporarily, but when we lose funding the results return to previous levels. Those who participated in these programs are rightfully distrustful.</p>
<p><b>Reality: Causes for Current Performance</b></p> <p>Why things are operating the way they are</p>	<p>Two years ago, Jamal was in the ER six times with episodes related to asthma. He missed 30 days of school, and his mother missed a few weeks of work when she couldn't find anyone to take him to appointments or care for him.</p> <p>Jamal and his mom were assigned to a community health worker about a year ago. Jamal now works with his school nurse to manage his medication. His mom has received coaching about reducing triggers for asthma attacks in the home and was linked with a program that provides free vacuum cleaners. Jamal sees a primary care provider at the health clinic every six months and has only missed a few days of school this year with no visits to the ER. He has started to play basketball at the Boys and Girls Club.</p> <p>Change is possible, but asthma is still the largest cause of school absences. The Department of Public Health is actively working with the Housing Department and Department of Education to implement more systemic solutions. Rather than focus only on urgent care, we know that we can make a difference by addressing the conditions that lead to problems. Let's build on successes like this and save our citizens from a vicious cycle of physical, economic, and emotional suffering.</p>
<p><b>Reality: Costs of Doing Nothing More</b></p> <p>Projected performance if things stay as they are</p>	<p>Allowing this situation to persist will result in a significant loss of human potential, including increased rates of incarceration and unemployment, drug abuse, homelessness, and hundreds of millions of dollars directed at urgent services to deal with these problems. The costs of being below average and the waste of many varieties that our community experiences are unacceptable. If left unaddressed, incidence of illness could increase by 5%, graduation rates could decrease by 5%, unemployment rates could increase by 3%, and end-of-life-care costs could increase by many thousands of dollars per person.</p>
<p><b>Value of Closing the Gap:</b></p> <p>A qualitative and quantitative summary of the benefits and costs of the proposed course of action.</p>	<p>More pervasive health and well-being yields social and economic benefits. We are able to invest in a system of health (e.g., housing, rather than homeless shelters). We are able to break the cycle of abuse and poverty by treating all children as our children. We see the benefit of greater economic activity from the number of companies that have started or moved here and by the number of new job opportunities that are available as a result.</p>
<p><b>Unique Value You Add:</b></p> <p>A positioning statement that explains WHAT benefits you provide for WHOM, and HOW you do it UNIQUELY well</p>	<p>Our partnership has the right people at the table, talks about tough issues, stimulates innovation and learning, creates stability beyond the current political cycle, provides a new expression for our democratic ideals to realize the possibilities for our community, and attracts support for long-term economic investment by engaging business leaders and others in building a better future, together.</p>

## NEXT STEPS

# Using Your Value Proposition Narrative to Guide Action

Building and refining a strong value proposition narrative, including all of its components, is iterative. It can be helpful to think of the value proposition narrative as both the beginning and end of a strategic planning process (which it can be, but does not have to be). At the beginning of the process, the value proposition narrative serves as an invitation to others to be part of framing the development of strategy and action plans. Later, once you have created more specific plans, you should revise your value proposition narrative so that it describes in more detail the specific value that you will create by implementing your strategy.

When you and your stakeholders have come together to articulate and pursue a shared vision and close the gap, the next step is to explore how you can most effectively close that gap. To that end, you can use the gap you've identified in the value proposition narrative as the basis for creating a comprehensive strategy for transforming health and well-being in your region. A comprehensive strategy will have two components: (1) a credible theory of system change, which demonstrates how the myriad forces in a region interact to create health or disease and then explains how these forces will submit to or resist change over time if a particular set of actions takes place; and (2) a portfolio of interventions, which describes how leaders will achieve the change they seek through a selection of policies, programs, and investments.

ReThink Health has created (and continues to develop) other resources for crafting a comprehensive regional strategy. To get started, read through our blog series—beginning with Bobby Milstein's post "[No More Fragmentation: Crafting a Comprehensive Strategy for Regional Health and Well-Being](#)"—which discusses:

1. What is a comprehensive regional strategy?
2. Developing a theory of system change and building an interdependent portfolio of interventions
3. Defining and setting clear system boundaries to help guide decisions
4. The value of system prototyping to allow us to identify, provoke, and learn about the interactions in a given system
5. Overcoming the conflicts that arise when leaders come together to develop a comprehensive strategy

One of the tools offered in the series is the [Negotiating a Well-Being Portfolio Exercise](#). This simple exercise asks stakeholders to consider how they would reallocate resources to better achieve a regional vision, usually by investing more in the vital conditions for health and well-being (such as housing, jobs, and safety).

- Engage more and more stakeholders in a planning process
- Get commitments for action and resources
- Complete a more in-depth analysis of stakeholders' value for specific interventions
- Make the case to philanthropic funders to inspire their investment in your efforts
- Make the case to stakeholders that they can pay for the value you provide

### **Please share your stories about creating your value proposition narrative.**

Describe how it invites stakeholders to participate and invest in your efforts, and how it serves as the foundation for transformation strategy. Use the hashtag #ThinkWithUs or email us at [ThinkWithUs@rethinkhealth.org](mailto:ThinkWithUs@rethinkhealth.org).

## APPENDIX 1

# Value Proposition Narrative Assessment

**Overview:** This worksheet helps collaborative groups (e.g., multisector partnerships) or independent organizations, programs, or initiatives (whether or not you are working on a region-wide effort) articulate the value proposition narrative you are currently using and set priorities for improvement.

### Objectives

- Articulate the value proposition narrative currently in use
- Assess components of current value proposition narrative against criteria
- Identify priorities for improvement

**Users:** This worksheet can be completed by a core leadership team from a collaborative group working to move a health transformation effort forward (e.g., a multisector partnership) or from an independent initiative, organization, or program. NOTE: If you have a limited amount of time, or if there are individuals who are new to the effort, it may be helpful for one person (someone with a good sense of the group's or organization's history) to complete this assessment, distribute copies, and have a team meeting to complete steps 2 to 4 under "Instructions for the Team Meeting" below. Sharing a draft assessment that participants can react to can help stimulate conversation and bring new individuals up to speed.

**Preparation:** In advance of the meeting, distribute copies of the entire toolkit, calling special attention to this exercise. Also distribute any vision and value proposition statements currently in use (these could be outlined in your strategic plan or in a regional health improvement plan) to all participants and ask them to follow the instructions for individuals below. Ask participants to complete the assessment worksheet. If you plan to summarize their responses prior to the team meeting, ask them to return their completed worksheets in advance of the meeting.

Provide these instructions to individuals so they can complete the assessment worksheet on their own, prior to a meeting with the whole team:

1. Review the materials provided (vision, value proposition narrative—if any)
2. Complete the assessment worksheet below, summarizing for each component how the statements do and do not meet the specified criteria.
3. Note any specific strengths and weaknesses of each component.
4. Provide a rating of 1, 2, 3, 4, or 5. 1 = doesn't meet criteria; 2 = minimally meets criteria; 3 = fairly meets criteria; 4 = meets criteria; 5 = strongly meets criteria. Example: The vision is "all children are kindergarten ready." This vision is measurable (strength) and minimally clear (strength), though more detail could be added (weakness). Why it matters is less clear (weakness). This vision would receive a rating of 2 (minimally meets criteria).

**Instructions for the team meeting:** Depending on the complexity of the value proposition narrative being assessed, the team meeting can be completed in 1-3 hours. Identifying a neutral facilitator to guide the team dialogue is recommended so all team members can participate fully and honestly.

1. Post everyone's ratings (either prepare a summary of all ratings in advance or use a flip chart or video screen).
2. Discuss your ratings of each component as a group, combining notes on strengths and weaknesses.
3. Discuss: Which components are already completed? Which components need improvement or do not exist at all?
4. Determine your priorities and path to improvement. For example, by when will you address specific components? When will you share a version of the value proposition narrative with the board?

# WORKSHEET

## Stakeholder Value Analysis

Value Proposition for: \_\_\_\_\_

Assessed on: \_\_\_\_\_

Components	Criteria	Summary	Strengths	Weaknesses	Rating
<p><b>Overall</b></p> <p>An articulation of aspirations to achieve a desired future state, rooted in widely shared values</p>	<ul style="list-style-type: none"> <li>• <b>Head:</b> It makes a rational, reasoned, and specific argument with an appropriate risk/reward ratio.</li> <li>• <b>Heart:</b> It triggers connection and passion.</li> <li>• <b>Hands:</b> It motivates action.</li> </ul>				
<p><b>Vision</b></p> <p>A picture of or statement about what it will look like when your aspirations are realized</p>	<ul style="list-style-type: none"> <li>• <b>Clear:</b> Stated aspirations are concise and memorable; they are easy to understand, communicate, and imagine actually happening.</li> <li>• <b>Compelling:</b> The desired future state creates an emotional pull because it represents a significant, desirable accomplishment.</li> <li>• <b>Shared:</b> Resident voices and organizational interests are represented. There is widespread awareness of stated aspirations, and an intended outcome is greater ownership and equity.</li> <li>• <b>Transformational:</b> The aim is to train the system in ways that generate progressively greater and more inclusive value over time, rather than simply adjusting certain parts to get marginally better results.</li> </ul>				
<p><b>Reality and the Cost of Doing Nothing More</b></p> <p>A clear-eyed assessment of historical and current performance, as well as projected performance if things stay as they are</p>	<ul style="list-style-type: none"> <li>• <b>Accurate:</b> Current results and trends are substantiated through verifiable facts from multiple data sources.</li> <li>• <b>Rigorous:</b> The analysis uses sound methods.</li> <li>• <b>Comprehensive:</b> The statement of reality delves deeper to uncover causes beyond the presenting symptoms.</li> <li>• <b>Reflective:</b> Explanations for current results include lessons learned from past efforts.</li> </ul>				
<p><b>Value of Closing the Gap</b></p> <p>A qualitative and quantitative summary of the benefits and costs of the proposed course of action.</p>	<ul style="list-style-type: none"> <li>• <b>Relevant:</b> The value conveys a clear intersection of stakeholder interests.</li> <li>• <b>Investable:</b> The value of closing the gap presents an attractive business case by communicating a credible path to achieve specific returns.</li> </ul>				
<p><b>Unique Value You Add</b></p> <p>A strong value proposition narrative will help your stakeholders answer the question, “Why should we be part of an effort to transform health and well-being in our region?” It will convince them of the tangible value of being involved.</p>	<ul style="list-style-type: none"> <li>• <b>Capable:</b> You have the skills to deliver on the benefits.</li> <li>• <b>Credible:</b> You have the experience, networks, authority, and reputation to deliver on the benefits</li> </ul>				

**APPENDIX 2**  
**Web Template**

