

Strategic Planning for Planetary Health and Sustainable Care:

Readiness Assessment Tool

Healthcare organizations operate within highly complex and uncertain ecosystems, underscoring the importance and challenges of strategic visioning for sustainability. A standardized, one-size-fits-all approach is impractical due to the diversity of organizational contexts, strengths, and priorities. Each institution must develop tailored strategies that address its unique circumstances, including supply chains, clinical workflows, interdepartmental coordination, and localized climate risks. This need for customization is heightened by varying provincial mandates and regulatory frameworks, which may not always provide consistent guidelines for environmental accountability. As healthcare organizations face increasing pressure to demonstrate sustainability leadership, strategic planning becomes essential for aligning efforts, ensuring compliance, and addressing both local and systemic challenges. Guided by CASCADES' playbook "Strategic Planning for Planetary Health and Sustainable Care" this tool provides organization **seven organizational practices** to guide and advance strategic planning for sustainable healthcare.

Instructions

For each of the seven practices:

1. Review the suggested activities.
2. Reflect on the extent to which your organization has initiated or implemented these activities.
3. Select the appropriate status for each practice in the third column:
 - Not started: No activity or plans are currently in place.
 - In progress: Activities are underway but not yet fully established or implemented.
 - Fully in place: Activities are well-established, routinely practiced, and monitored.

In the notes section, please include any specific details and supporting evidence for your selection, and reflect on how broadly the practice applies across different sustainability domains; for example, traditional areas such as energy management and facilities versus emerging areas such as sustainable food systems, infection prevention and control, and clinical services.

After completing the assessment table:

4. Use the Assessment insights and next steps section to summarize your reflections:
 - Identify areas of alignment and strength.
 - Highlight key gaps or opportunities.
 - Prioritize 1–2 practices for near-term focus and identify early steps to build momentum.

This tool is not a scorecard-it is a reflective guide to support dialogue, alignment, and strategic decision-making within leadership structures to advances strategic planning for planetary health and sustainable care.



Practice	Activities	Assessment
1. Engage board and senior leaders	<ul style="list-style-type: none"> — Formalize an organizational commitment to climate action from senior leaders and board members. — Designate accountable senior executive leaders and/or board members to oversee and sponsor the sustainability agenda. — Articulate and embed the relevance of the sustainability agenda across all organizational portfolios. — Ensure senior leaders and board members have a baseline understanding of the importance of sustainable health systems and their role in advancing this agenda. 	<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Fully in place <u>Notes</u>
2. Embed sustainability into the organization's strategic framework	<ul style="list-style-type: none"> — Conduct internal and external environmental assessments to identify and prioritize sustainability and climate-related risks and opportunities for the organization and the communities it supports and serves. — Develop or integrate a planetary health action plan or sustainability strategy that outlines a vision, goals, priorities, and timelines, ensuring alignment with organizational mandates, vision, mission, and broader strategic priorities. — Translate and cascade sustainability goals across all different levels of the organization, to foster alignment, shared understanding, and effective implementation. 	<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Fully in place <u>Notes</u>
3. Establish a multi-functional sustainability team, working group of task force	<ul style="list-style-type: none"> — Establish a multidisciplinary team that can inform, draft, and operationalize the organization's sustainability agenda, mandates, and initiatives, drawing on internal or external expertise as needed. — Leverage and expand traditional expertise in facility-based GHG reduction and waste management, while incorporating knowledge and multi-functional connections in emerging areas such as clinical and community care operations, procurement, infection prevention and control, food services, financial services and more. — Establish a clear communication mechanism with senior executive leaders and Board members, for feedback and endorsement of the strategic direction and recommended actions. 	<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Fully in place <u>Notes</u>
4. Strengthen internal organizational capacity	<ul style="list-style-type: none"> — Create new, dedicated structures to advance sustainability initiatives, or integrate the sustainability agenda into existing frameworks or structures to promote cross-functional collaboration and leadership, while leveraging existing efforts and resources. Existing structures that can be mobilized to support sustainability initiatives may include, but are not limited to: Quality Improvement, Accreditation, Diversity, Equity and Inclusion, Finance, Indigenous Health, Energy and Facilities, and Research and Innovation. — Deepen capacity in traditional sustainability areas (e.g., re/development, facilities management, environmental services, etc.) — Strengthen capacity in newer sustainability areas (e.g., clinical operations, procurement, infection prevention and control, food services, etc.). — Develop and implement onboarding and induction modules, resources, and training materials aimed at promoting planetary health and sustainable care literacy throughout the organization. — Facilitate opportunities for staff to develop and share knowledge and skills, including through continuing professional development programs. — Identify and map existing high-impact environmental sustainability efforts, initiatives and funds across the organization and provide support to ensure their sustainability and expansion for greater impact. — Allocate resources for the organization to effectively carry out the sustainability agenda and achieve its goals 	<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Fully in place <u>Notes</u>

5. Establish external partnerships and networks for greater impact	<ul style="list-style-type: none"> — Establish or join networks to enable local learnings and the exchange of best practices, with a continued sectoral emphasis on promoting high quality, low-carbon, climate-resilient, equitable, and sustainable health services and systems. — Strengthen cross-sectoral collaboration and synergies to encourage a cohesive and coordinated action 	<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Fully in place <u>Notes</u>
6. Implement organizational-level measurement and reporting systems	<ul style="list-style-type: none"> — Define organizational sustainability goals and performance indicators that align with overall priorities and address the climate-related risks and opportunities relevant for the organization. — Ensure that the selected metrics and targets adhere to applicable federal, provincial, and local regulations as well as relevant sustainability and climate disclosures. — Develop an integrated measurement strategy and data collection plan that incorporates various sustainability performance areas (e.g., energy emissions, waste management, clinical services, procurement, climate change adaptation, emergency management, etc.). Recognize the importance and limitations of the chosen metrics — Prepare and publish reports on progress related to sustainability metrics and targets for both internal and external stakeholders. Ensure that updates are consistently provided across all organizational levels to maintain awareness and accountability. 	<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Fully in place <u>Notes</u>
7. Develop strategies to communicate and engage with patients, caregivers and communities	<ul style="list-style-type: none"> — Establish mechanisms to meaningfully engage and partner with patients, caregivers and communities throughout the care-delivery process. — Develop resources that help healthcare staff guide conversations with patients, along with tools for patients and families to make clinically appropriate decisions that can also minimize healthcare emissions. — Co-design a strategy for ongoing and meaningful engagement with Indigenous Peoples guided by principles of reconciliation and respect 	<input type="checkbox"/> Not started <input type="checkbox"/> In progress <input type="checkbox"/> Fully in place <u>Notes</u>

Assessment insights and next steps	
1. Do the seven practices align with your organization's current strategy and approach? If so, how—and what strengths stand out?	
2. What gaps did you identify across the seven organizational practices?	
3. Which practice(s) should take priority over the next 6 months? What early steps could help build momentum in those areas?	