Network for a Healthy California
Sustainability Assessment Tool

Companion Guide

This document is a companion guide to the *Sustainability Assessment Tool*. This guide provides resources, tools, and "How Tos" to help you strengthen those items that were marked as "Somewhat Agree" or "Do Not Agree" on the Assessment Tool. The Guide may also provide suggestions for how to further improve the highest marked activities on the Assessment. We do not recommend reading the Guide cover to cover, but reviewing and discussing the sections by priority, based on how you would like to improve your sustainability efforts.

Organizations should not expect to have answered "Strongly Agree" with every statement offered on the Sustainability Assessment Tool, and incorporating efforts to improve program sustainability will take time and coordination. Please tailor the resources and information in this guide to best fit your program sustainability needs. We wish you the best of luck in your future sustainability planning endeavors.

Developed by the Center for Civic Partnerships (Center), a center of the Public Health Institute. The Center is a nonprofit organization whose mission is to provide leadership and management support to build healthier communities and more effective organizations.

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Section One

Analyzing Organizational Processes and Structures that Support Program Sustainability Success

There are a number of factors that influence the likelihood that you will be able to sustain your community improvements. These factors typically fall into one of three categories:

- Program Design & Implementation
- Organizational Structure & Process
- Political, Economic and Social Issues

Section One of the *Sustainability Assessment Tool* outlines types of activities that fall within these categories that are considered best practice for positioning your programs for sustainability success. In this section of the *Companion Guide*, we've brought together tips, "How Tos" and resources to support your positioning efforts.

Writing a Mission Statement

- A **mission statement** is a statement of purpose that guides the actions of an organization by describing the organization's overall goal. A mission statement should guide decision-making and provide a framework for creating organizational strategies and program design.
- Mission statements answer the following questions:
    - Who is your organization?
    - What does your organization do?
    - Why does your organization exist?
    - For Whom does your organization exist?
- Review your mission statement often to ensure that your programs and services continue to support mission achievement, thereby effectively minimizing the potential for "mission-creep."

> ***Example Mission Statement:*** *The Vegetable Consumption Consortium is a nonprofit, membership association dedicated to reversing the childhood obesity epidemic by creating fun and educational materials and learning tools for parents and child care providers to teach school-aged children healthy eating habits.*

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Conducting Strategic Planning Efforts

We have found that many times, it's not the brainstorming and planning phase of a strategic planning effort that is an issue. Instead, it's the act of implementing a plan that never seems to go as smoothly as intended. Below are some tips for ensuring your strategic planning efforts are successful from planning through implementation.

- Planners Aren't Always Doers - Avoid strategic plan burnout by involving additional staff, volunteers and outside assistance to make your strategic plan a reality.
- Coordination is Key - Assign plan implementation coordination to one person. This person has exceptional organizational and follow-through skills, and can assertively but politely ensure forward progression in implementation activities.
- Schedule, Schedule, Schedule - To keep strategic plan implementation activities in the forefront of people's minds, make intentional efforts to schedule events such as strategic plan "kick-off" events, action planning meetings, and regular check-ins. It's also a good idea to make plan reporting a regular part of board/staff meeting agendas.
- Set a Definitive Timeline - Planning phases should rarely require more than three to six months to complete; you endanger the energy and motivation to implement your plan if the planning phase takes too long.
- Celebrate Successes - Take every opportunity to let your board/staff, community and partners know when you have successfully completed strategic plan milestones such as successfully securing a funding stream, hiring new staff, holding events, starting or revitalizing a program, etc.

Additional Resources

- *Strategic Planning for Public and Nonprofit Organizations (Bryson, 2011)*
- *All About Strategic Planning, Free Management Library*
- *Business Planning for Enduring Social Impact: A Root Cause How-to Guide*

Defining Sustainability

We believe that program sustainability, at its core, can be defined as the continuation of community health and/or quality-of-life benefits over time. The focus of program sustainability, then, should be on the outcome(s) of the effort and not on the effort itself. Consider the following sustainability options when defining what sustainability means to your program.

- Sustaining community benefits can, of course, mean the continuation of a program.
- Sustaining community benefits can also mean the successful creation of community policies and/or system changes.

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- Sustaining community benefits can further mean the increase in community capacity and skill sets to effectively address the problems or challenges directly.

> ***Sample Sustainability Definition:*** *The continuation of the Community Family Resource Center's programs and services means families have access to resources and information that empower them to support their children's early care and education needs and allow children and families to be healthy and thrive within their community.*

Infusing Sustainability Discussions into Initial Program Planning Efforts

Rarely do we find ourselves at the inception of a brand new program or service. However, when you find yourself in this exciting situation, consider incorporating the following three practices to help ensure a long-lasting benefit to the community.

Make Evaluation a Priority

- Identify at the beginning of an effort what outcomes you intend to achieve, and build evaluation systems into the program that allow you to show progress in achieving those outcomes. ***(See also Section Two, "Evaluation & Priority Setting")***
- Be realistic about the time it will take to collect meaningful data and build this time into funding proposals. Additionally, take full advantage of trend data and information collected from partner agencies and other efforts to show potential impact.
- Most importantly, create an assessment structure that allows you to continually check in with your community to confirm ongoing needs. You'll want to be flexible and responsive should their needs change.

Build Community Partnerships

- Identify other like-minded agencies that serve the same or tangential constituents and find ways to partner with them. This will allow you to not only successfully realize your mission, but it will provide a means to more comprehensively serve your community. (***See also Section Five, "Cultivating Collaboration and Community Partnership")***
- With successful partnerships in place, identify ways that you can leverage current dollars to secure additional funding and other in-kind support.

Identify Effective Outreach Strategies

- Select a name, logo and possibly even a tag line that will help people identify your effort and make it easy to remember. ***(See also Section Four, "Marketing & Public Relations")***
- Ensure your website is easy to navigate and contains specific calls to action that explain how people can be involved and support your work.

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- When looking for program support, use not only your own marketing and social media venues, but also utilize partner listservs, websites, newsletters, etc.
- When looking for clients to serve, identify the types of media that your constituents use and depend on (ethnic papers and television, local places of worship, etc.), and create outreach pieces that can be used in those venues.

Nurturing Program Champions

An effective program sustainability strategy is to ensure that your programs have community buy-in and support. Your communities should not only believe in what you do, but they should also be able to identify the value of your programs and be willing to support your work. But how do you facilitate true synergy with your communities?

One way is to cultivate program champions who are external to your staff, boards and partners, and that are in positions of influence in the community. *The Network for a Healthy California* does this wonderfully by cultivating "Champion Moms," real moms who believe in health and wellness promotion, who take initiative to make positive change in their families, and who are willing to speak at *Network* events, meetings and partner functions. These women hold positions of influence in their communities. They may hold employment positions of influence, they may be talented public speakers, or they may simply be informal leaders - individuals who are respected and trusted within their community.

Once you have identified a few key individuals in your community whom you believe could be community partners, consider the following strategies to nurture champion relationships.

- Learn all you can about his/her agenda, interests and history.
- Find out who has access to the individual and have them assist you in building the relationship.
- Provide regular, brief updates to the individual (and his/her key assistants) on the status and accomplishments of your effort. Include opportunities for them to become involved in the program by volunteering, attending open houses, etc.
- Characterize your work broadly within the context of his/her priorities and interests.
- Look for ways in which your effort can further the individual's goals and objectives.
- Give the individual opportunities to be recognized for his/her connection to the project (e.g. media appearances, awards, etc.).

Once there is an established relationship between your organization and your program champion, make sure that you provide continued support to your champion through ongoing training. This can be through venues such as program trainings, informational meetings, email updates, etc. By developing strong program champions, your program will be that much further toward accomplishing its sustainability goals.

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Adopting Internal Structures and Processes that Support Program Sustainability Efforts

- As stated earlier, avoid "mission-creep" by regularly reviewing your mission statement and ensuring fit between programs and mission.
- Provide training opportunities for staff, volunteers, and governance members so that they can effectively promote the work in the community.

Considering External Influences and Removing Potential Barriers

Sometimes, there are things that we simply cannot control - severe economic downturns, natural disasters, or a particular political climate to name a few. However, program sustainability planning efforts should include a scan of potential external influences that could negatively impact continued service to the community so that appropriate action can be taken when possible to address sustainability barriers.

Consider the following tips to help mitigate potential roadblocks:

- Recognize that in order to garner support from a variety of different audiences, you'll need to draft different messages and outreach strategies to resonate with each audience.
- Involve residents in problem solving and decision making activities so that residents have a commitment to the effort. (***See additional tips below.***)
- Build relationships with funders, corporations, individual donors, and other community groups and residents to gain a wider net of support, thereby creating a stronger, unified community voice.
- Make your issues part of someone else's agenda, plan or operation. Is there a city council member with a tie to the issue you're addressing? Is there a county educational initiative that could benefit from a particular service you provide?

Incorporating Stakeholder/Community Input into Program Sustainability Planning Efforts.

This may be the toughest part of what you do: effectively engaging community residents to feel buy-in and ownership of the programs and services being provided. Here are a few tips for creating meaningful engagement venues for community members.

- Facilitate focus groups to solicit feedback or to problem solve.
- Organize "town hall" meetings on specific issue items.
- Schedule periodic "open houses" or site tours for residents to learn about your programs and to ask questions.
- For nonprofit organizations, provide governance opportunities for residents (either by sitting directly on the Board or via committee service).

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Additional Resources

(Resources focus on aging well issues, but can be adapted for any program)

- *Conducting Aging Well Public Forums*
- *Conducting Aging Well Focus Groups*

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Section Two

Evaluation and Priority-Setting

Evaluation findings help justify why an effort should or should not be continued. Findings also demonstrate success to potential funders. Therefore, it is important to collect assessment data and other information (including community input) to make informed decisions on whether your programs and services should be continued, and if so, in what form.

Section Two of the Sustainability Assessment Tool indicates how well your organization or program incorporates evaluation best practice. This section of the Companion Guide offers tips and tools to strengthen your efforts.

Engaging Clients and Community Residents in Data Collection

- Provide different venues for residents to tell their story, such as using informal conversation, focus groups, surveys, drawings, etc.
- Ensure that all data collection tools are culturally sensitive and appropriate.
- Translate evaluation tools when possible.
- Once you've collected the data you need, share the information with stakeholders to gain their reactions and perspectives.

Finding Resources for Evaluation Efforts

- Can you get funding specifically for evaluation? Some funders, like The California Wellness Foundation, provide core support funding that can be used for such functions as staff salaries, planning efforts, and evaluation activities.
- Do you consistently write evaluation activities into program grant proposals?
- Does your organization/program collaborate with other partners? Consider conducting a shared evaluation (or simply share data with partners).
- Can you secure AmeriCorps funding, or other volunteers to conduct evaluation efforts?
- Can you find a graduate student who might provide services free or at a reduced rate in exchange for the opportunity to publish an article or fulfill service requirements?

Additional Resources

- *Evaluation on a Shoestring Budget, Wilder Foundation*
- *Innovation Network's Point K Learning Center provides free online planning and evaluation tools for nonprofit organizations.*

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Creating a Logic Model

The *W.K. Kellogg Foundation's* Evaluation Handbook provides a description of three evaluation models: project-level, cluster, and programming/policy making. It also provides a comprehensive blueprint for planning and conducting a project-level evaluation.

In addition, the Foundation also created a companion guide to the Evaluation Handbook, entitled Logic Model Development Guide. This companion guide provides detailed discussions of how a Logic Model works, includes comprehensive instructions for creating a Logic Model, and provides instructions for conducting program evaluations using the model's framework. You can also visit the Foundation's website at www.wkkf.org and type in "Evaluation Handbook" or "Logic Model" into the search bar at the top right-hand corner of the page.

Collecting Meaningful Data

We often hear from training groups that they either have difficulty collecting data that helps them tell their story, or they have too much data and they simply are not sure what to do with it all. To ensure that your data is working for you rather than against you, considering the following tips:

- Keep all tools short, simple and easy to understand. Ensure language is appropriate for age group / ethnicity, etc.
- Consider using a wide range of tools including interviews, discussion groups, evaluation exercises, diaries, etc.
- Be clear about the purpose of each tool and what questions you want answers to. This requires that you first identify what you will do with the data once collected, which can help minimize collecting unnecessary data.
- Give people an opportunity to provide negative as well as positive responses.
- Provide an opportunity for people to add additional comments.
- Explain the reason for the questionnaire/interview/exercise, etc. and what will happen to the data. Stress anonymity and confidentiality when possible and appropriate.
- Pilot tools before using them. Testing data collection methods ensures the tool is clear, does not ask ambiguous questions and supports meaningful analysis.
- Avoid leading questions (i.e., one which gives the impression of there being a right answer) when conducting interviews or designing questionnaires.
- Aim to obtain quantitative data as well as qualitative data for each project.
- Whenever possible, try to find someone independent of your organization to evaluate the service to minimize perceptions of bias.

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Section Three

Resource and Fund Development

Flexibility and creativity are key concepts for this part of your sustainability planning effort. It is important to be flexible in exploring potential options for continuation because deciding to continue an existing effort does not necessarily mean it will continue in the same way. In that same vein, it is important to think creatively about fund development activities and leveraging funding sources to maximize the potential for sustainability success. The following section provides information on identifying funding gaps, creating appropriate funding structures, identifying true program costs, and leveraging dollars.

Creating a Funding Structure

Creating an appropriate funding structure for your program or agency is a matter of matching fund development activities to both your mission/purpose and to your constituents' needs. With that said, there is no one right formula by which to organize your funding streams. The most important strategy to remember, however, is to diversify funding without over-extending staffing capacities and abilities to manage the fund development efforts. Funding diversification minimizes reliance on any one funding stream and improves your ability to continue programs and services.

Consider the variety of ways that you can fund a program or effort:

- Foundation grants
- Individual donations
- Online giving campaigns
- Corporate giving campaigns
- Fee-for-service opportunities or other social enterprises
- Special events
- Government funding
- In-kind support (see also "Leveraging Dollars" later in this section)

This is certainly not an exhaustive list, and not all activities may be appropriate for your situation. However, it's important to consider potential funding gaps, both among the various ways funds can be secured ***and*** among the giving bodies within each category. (Look for missing foundations, community leaders, corporations and other entities that would be a potential fit for your funding structure, but to date, have not been approached.)

Consider the following questions as you create a funding structure that is appropriate for you:

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- What is the likelihood of continued support by [insert name] funder? Would continued funding be at the same level?
- Is there existing expertise and capacity on our staff/board/volunteer base that would allow us to take on a particular funding strategy?
- What are the costs associated with a particular funding strategy? Do we have existing resources to cover these costs? Can we find resources to cover these costs?
- Will the funding strategy pay-off immediately or will it take time to realize revenue? How long would it be before the funding strategy realizes profit?
- For existing fund development efforts, are we expending proportionate staff time and resources based on the revenue generated?
- Does the funding strategy being considered fit with our mission and culture?
- What are the potential barriers to successfully incorporating a funding strategy? Do we have ways to mitigate those barriers?
- What are the legal risks of a potential funding strategy? Do we have ways to mitigate those risks?

Additional Resource
Nonprofit Essentials: The Development Plan (Linda Lysakowski, 2007)

Identifying True Program Costs

Do you know how much it really costs to deliver your programs and services? We're not talking about the budget amount allocated for a program, but the actual costs to sustain it. If you can answer yes to any of the questions below, you aren't capturing true program costs.

- Do you have staff so dedicated to the work and the community that they often work more hours than reported or paid? Are you that staff person?
- Do you receive in-kind donations, services, or items that are not captured in a program budget (donated bagels for a morning volunteer meeting; free recreation space for a children's play group)?
- Do volunteer hours go untracked or undervalued?

Tracking accurate program costs ensures that future project budgets are accurate, potential funding proposals won't short-side program delivery, and cost/benefit analyses can better guide the organization in specific activities over the long run.

Additional Resources

- *Cost Analysis Toolkit, Bridgespan Group*
- *Costs are Cool: The Strategic Value of Economic Clarity – brief, online article from Bridgespan*
- *Value of Volunteer Time, Independent Sector*

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Leveraging Dollars

Spending one dollar to get two dollars of value in return; that's the general idea around leveraging resources. Many organizations and agencies are familiar with the concept, and many would tell you that they've leveraged dollars successfully in the past. However, few may actually say that leveraging funding resources is a particular strategy they invest time in. This funding strategy requires solid community partnerships and collaboration, and appropriate accountability processes that foster ongoing trust and communication between partners. Here are a few ideas for leveraging dollars:

- Share leased space. Unfortunately, many organizations are facing layoffs and downsizing and may be forced to renegotiate office space. Consider sharing space with a like-minded agency to save on costs.
- Share office equipment. Similarly, some organizations that are co-located within the same office building (maybe down the hall) have found sharing general office equipment, like printers, faxes and telephone systems to be a beneficial resource sharing strategy.
- Share staff positions. More common for nonprofit organizations, sharing staff positions is typically found around functions such as fund development, technology, and administrative support. One organization may not be able to afford a full-time person, and a part-time or unbenefitted position may not be attractive to a potential employee. Therefore, two organizations that pool their resources and hire one full-time, benefitted employee may fare better.
- Combine advocacy efforts. This is probably the most common resource leveraging strategy used today. For organizations that work primarily in advocacy and public policy, leveraging outreach resources with other agencies and initiatives to organize large community support is an effective way to advocate for an issue.

You may find that leveraging your resources won't necessarily result in hard dollars, but rather in in-kind support. In-kind resources are just as needed and appreciated, and should still be assigned a value. (See ***Identifying True Program Costs*** on the previous page.) Not sure what to request as in-kind support? Consider the following ideas.

- Advertisement, Media Time (TV, radio)
- Printing
- Office Supplies
- Furniture/Equipment
- Leased Space
- Conference/Meeting Space
- Food
- Merchandise (i.e., Raffle Prizes, etc.)
- Signage
- Transportation
- Software
- Hardware/Computers
- Event Security
- Training/Consultants
- Translation
- Photography
- Graphic Design
- Web Page Design
- Facility Maintenance/ Repair
- Janitorial
- Volunteer Time/Board Service

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Section Four

Marketing and Public Relations

Identifying Target Audiences

Identifying target audiences is not difficult, and many nonprofit executives and staff can rattle off the target audience list by heart. Instead, we've included a list of potential groups that you may not have considered.

- Internal audiences (staff, board, etc)
- Funders
- Partner/potential partner agencies
- Elected officials
- City/county departments
- Corporate partners
- Professional associations
- Civic organizations
- Faith-based organizations
- Media

Creating a Marketing Plan

A carefully constructed marketing plan (increasingly called a "strategic communications plan") is vital to ensuring that all aspects of marketing operations are addressed and coordinated. The plan should include the basic marketing techniques that will be used, how market research will be conducted, who has responsibility for which components of the plan, etc. The general activities required to formulate a marketing plan are:

- Pull together a planning group; participants should possess a mix of skills and knowledge around internal programs, as well as effective marketing and outreach strategies.
- Review current marketing and outreach efforts; gather data about what marketing efforts have been successful and why.
- Conduct a SWOT (Strengths, Weaknesses, Opportunities, and Threats or Challenges) analysis around marketing efforts to date.
- Based on the analysis, identify marketing and outreach goals, objectives and agree to overall marketing strategies.
- Identify target audiences that you wish to connect with, and identify the communication vehicles that those audiences most typically use (social media, newspaper, email, etc.).
- Craft tailored messaging for each audience segment.
- Create action plans, budgets and timelines for outreach work.

Additional Resource

- *Sample marketing plan template*, *The Marketing Source*

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Finding Resources to Support Marketing/Outreach Efforts

Like evaluation, technology, or other non-direct program costs, it is sometimes difficult to secure the necessary funding to effectively promote your organization and programs. Consider the following questions as you develop avenues to support your marketing efforts.

- Can you get grant funding specifically for marketing? Some funders, like the Taproot Foundation, provide marketing grants that fund activities such as creating key messages and brands, developing brochure, creating websites, and writing annual reports. While this specific resource is for nonprofit organizations only, public agencies could also benefit by partnering with a nonprofit agency for a particular outreach effort.
- Do you consistently write marketing activities into program grant proposals? Consider rephrasing the way you talk about marketing and describe your efforts in broad language that fits with the funder's priorities. For example, request funding for "building community capacity through outreach efforts" or "organizing residents to speak with one voice" rather than for activities that "market to target audiences."
- Is your organization/program connected with the local Chamber of Commerce? They may be able to connect you with marketing and communications businesses that would be willing to provide pro bono or low-cost marketing support in your area.
- Can you secure AmeriCorps funding, or other volunteers to conduct marketing efforts?
- Can you find a graphic arts student who might provide services free or at a reduced rate in exchange for building their design portfolio?

Additional Resources

- *Convio, A cause marketing agency that provides support to public and nonprofit organizations.*
- *Frogloop, Care2's nonprofit marketing blog*
- *Nonprofit Marketing Guide, Training and tips for do-it-yourself nonprofit marketers*
- *Shoestring, A full-service, marketing and communications agency that exclusively serves nonprofits.*

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Section Five

Preparing for a Program Sustainability Planning Effort

This section of the assessment tool helps to evaluate the efficacy and usefulness of planning processes that currently exist within the organization. If you are embarking on a sustainability or organizational planning effort, considering the following tips and tools to enhance planning team effectiveness and ensure a smooth planning process.

Organizing Planning Meetings

There may be nothing more frustrating than attending planning meetings that either a) don't seem to have any end in sight, or b) tend to perpetuate the same discussions over and over and over again. Combat planning meeting fatigue by:

- *Agreeing to decision-making processes ahead of time.*
- *Assigning a meeting coordinator*. This person serves as a process coordinator who will be responsible for scheduling meetings, for ensuring internal and external communications are effective, for following through with individuals responsible for action steps, and for answering questions.
- *Articulating meeting goals*. Consider adding meeting goals to the top of agendas so that everyone can stay focused on the task at hand.
- *Repeating decisions and action steps*. Even those with steel traps for minds can be forgetful now and again. Help meeting attendees by keeping concise meeting minutes for future reference. If formal meetings minutes are not needed or required, consider at least electronically sending this information to planning members in order to support follow through and accountability.
- *Setting an overarching planning timeline*. We recommend that program sustainability planning efforts take no longer than 3 to 6 months depending on the complexity of the programs and services you're creating a plan for. Longer or poorly articulated timeliness may cause planning members to drop off midstream or may cause a decrease in true buy-in and support.

Inviting and Engaging Stakeholders

There are a variety of ways you can structure a planning team. If your organization or agency is small enough, you may consider full staff participation. You may also consider putting together a planning committee or workgroup of staff and other voluntary stakeholders such as board members, volunteers, county representatives, community residents, clients, etc.

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Regardless of planning group membership, it is important to incorporate community input whenever possible. This may be through direct planning group participation, or through one of the following activities:

- Facilitating focus groups to solicit feedback or to problem solve.
- Organizing "town hall" meetings on specific issue items.
- Developing a survey to collect community input.
- Scheduling periodic "open houses" or site tours so that residents can ask questions and to provide suggestions for improving programs and services.

Cultivating Collaboration and Community Partnership

Planning groups can also include partner agencies and community groups that have a vested interest in the continued benefit of your programs and services. Creating effective community collaborative relationships is difficult, and requires more due diligence than simply asking if an agency or organization is willing to partner with you on a planning initiative. Here are some things to consider when building your next community partnership.

- Is the vision and mission of a potential partner organization compatible with the work you wish to accomplish? Is it compatible with your own vision and mission?
- What is the natural "fit" of the potential partner agency? Do they serve similar clients? Do they provide tangential and supportive services to a shared client base?
- Is there a mutual benefit to partnering in a planning effort?
- Is there a history/relationship that supports a new partnership?
- Is the partner agency willing to accept the roles and responsibilities of the planning partnership?

Additionally, you may want to consider these organizational structure and process issues as you review potential collaborative relationships.

- Does the organization size, leadership or structure support or detract from a potential planning partnership?
- Do the partner agencies have similar governing bodies and processes?
- Do key organizational staff, leaders and volunteers support the planning partnership?

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Using Outside Facilitation When Necessary

There will likely be a few points in the sustainability planning process that require the planning group to make difficult decisions. These decisions could involve eliminating a program that someone in the group values, reducing staffing levels, or working through a sticky political situation. Contracting with a neutral facilitator may make this process easier and will ensure that everyone involved has the opportunity to participate.

A quality facilitator will understand the difference between his/her role and the role of the planning group. Make sure your facilitator is able to manage the process while leaving the content discussions and decisions up to the participants.

Participants are responsible for… *Content (What)*	**Facilitators are responsible for…** *Process (How)*
• The subjects for discussion • The task • The problems being solved • The decisions made • The agenda items • The goals	• The methods & procedures • How relations are maintained • The tools being used • The rules or norms set • The group dynamics • The climate

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