

## Network for a Healthy California - Sustainability Assessment Tool Instructions



This tool is designed to help you determine areas of strength and weakness within your efforts to sustain your *Network*-funded projects. By maintaining your strengths and improving on your weaknesses, you can enhance your ability to work with low-income Californians, and sustain the improvements you are making in your community in areas such as food security, increasing fruit and vegetable consumption, increasing physical activity, and reducing obesity and overweight, etc. The tool and associated companion piece were pilot tested by *Network*-funded partners. The pilot group found the tool easy to use and valuable in identifying both strengths and areas for additional focus.

This assessment tool is not scientific. It is meant to give you a snapshot of your organization's position at the present time, so you can identify areas for improvement. We encourage you to obtain input from other individuals as appropriate, such as staff, volunteers and/or constituents, external stakeholders, partners, etc. Individuals who complete the tool should have a strong working knowledge of your program(s). This tool can be completed individually or as a group, through discussion.

The assessment tool is divided into five sections on the following topics (see page tabs at the bottom): analyzing current processes and structures, evaluation and priority setting, resource and fund development, marketing and public relations, and planning preparation.

**Please read each statement and place an "X" in the box that is closest to your level of agreement with the statement (strongly agree, somewhat agree, or do not agree). If the item does not pertain to your organization, place an "X" in the not applicable (N/A) box.** Please only mark one box per statement. If several people complete the tool individually, you can summarize the results (i.e., note how many people mark each response).

You'll notice that some of the statements have comments attached. Hover your mouse over the green question marks in each box to discover where corresponding information and resources can be found in the *Sustainability Companion Guide*.








This organizational assessment tool is adapted from the following instruments:

*o Sustainability Toolkit: 10 Steps to Maintaining Your Community Improvements, 2nd Edition. Center for Civic Partnerships (2011)*





*o Lewis, A. Nonprofit Organizational Assessment Tool. University of Wisconsin Extension. (2000)*

*Available: <http://www.uwex.edu/ces/cced/nonprofits/management/assessment.cfm>*





**Network for a Healthy California - Sustainability Assessment Tool**  
**Analyzing Processes and Structures that Support Program Sustainability Success**

		Agreement with Statement (Place an "X" in one box per statement)			
		Strongly Agree	Somewhat Agree	Do Not Agree	N/A
1. Our written mission statement is widely understood, agreed upon, and communicated by the governing body and volunteers (if applicable), staff, constituents and community.					
2. We have a current strategic plan (2-5 years).					
3. We have identified what "sustainability" means for our organization, and communicated that definition to the governing body and volunteers (if applicable), staff, constituents and community.					
4. Program sustainability is considered when designing and implementing programs and services.					
5. Information from constituents, funders and the general community is considered when thinking about program sustainability.					
6. We use both qualitative and quantitative data to support our program sustainability efforts.					
7. We make intentional efforts to communicate our program activities and successes to funders, constituencies, staff, board and volunteers (if applicable), and the community at large on a regular basis.					
8. We actively identify, foster and maintain relationships with program champions in our community to help "tell our story".					
<b>Totals</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>




**Network for a Healthy California - Sustainability Assessment Tool  
Evaluation/Priority-Setting**

	Agreement with Statement (Place an "X" in one box per statement)			
	Strongly Agree	Somewhat Agree	Do Not Agree	N/A
1. Staff, and/or governing body members, and/or collaborative members are committed to outcome measurement.				
2. Adequate resources (e.g., staff time, fiscal resources, infrastructure) have been allocated for evaluation. 				
3. We have adequate evaluation systems in place for assessing the organization's progress toward goal achievement.				
4. We strive to incorporate stakeholder/client/partner input into program evaluation efforts. 				
5. We have constructed a logic model or evaluation plan for each program/service. 				
6. We collect information to measure program outcomes, not just processes. 				
7. We have a regular forum for reflecting on the evaluation findings and using them for program improvement, identification of effective practices, resource allocations, public relations and long-range planning.				
8. The evaluation results are shared with key stakeholders, including community, customers, volunteers, staff and board.				
9. Evaluation data is used to make program revision or discontinuation decisions.				
<b>Totals</b>				




**Network for a Healthy California - Sustainability Assessment Tool**  
**Resource and Fund Development**

	Agreement with Statement (Place an "X" in one box per statement)			
	Strongly Agree	Somewhat Agree	Do Not Agree	N/A
1. We have a clear understanding of our major funders and why they support our programs. 				
2. We have identified funding "gaps" and have identified strategies to address those gaps.				
3. Our resource development efforts secure adequate financial resources. 				
4. We are satisfied with our current funding structure (mix of funding sources).				
5. We are able to show 'true' or 'actual' costs of each of our programs/services. 				
6. We make an active practice of trying to leverage existing funding sources to secure additional support when possible (either in-kind or fiscal support). 				
<b>Totals</b>				

**Network for a Healthy California - Sustainability Assessment Tool**  
**Marketing and Public Relations**

	<b>Agreement with Statement</b> (Place an "X" in one box per statement)			
	<b>Strongly Agree</b>	<b>Somewhat Agree</b>	<b>Do Not Agree</b>	<b>N/A</b>
1. We have identified target audiences (including funders, donors, clients/customers). 				
2. Within the last two years, we have asked our target audiences about their needs and/or how satisfied they are with our services.				
3. We have a current marketing plan. 				
4. We have updated our marketing materials within the past two years.				
5. Our marketing materials are targeted to specific groups and individuals when appropriate.				
6. Our website has been updated with new information within the past 3 months.				
7. We have regular communications with managers/program officers who fund our organization.				
8. We are able to attract positive media coverage when desired.				
9. We actively identify, foster and maintain relationships with program champions in our community to help "tell our story". 				
<b>Totals</b>				

**Network for a Healthy California - Sustainability Assessment Tool**  
**Preparing for Sustainability Planning**

	<b>Agreement with Statement</b> (Place an "X" in one box per statement)			
	<b>Strongly Agree</b>	<b>Somewhat Agree</b>	<b>Do Not Agree</b>	<b>N/A</b>
1. We have a "coordinator" that helps organize our program sustainability efforts and, if applicable, ensures follow-up on our sustainability planning meetings and activities. 				
2. We involve a variety of individuals in our program sustainability planning discussions and meetings, i.e. staff, board and volunteers (if applicable), funders, constituencies, other external stakeholders, and the community at large. 				
3. We have identified an outside facilitator to assist with large group or complex/difficult discussions (should the need arises).				
4. We have explicit decision-making processes identified and agreed upon when discussing program sustainability issues (or an overall, agreed upon decision-making process within the organization).				
5. We make an intentional effort to set aside time to have program sustainability planning discussions and/or create a timeline for our program sustainability planning efforts.				
6 . We ensure that all program sustainability planning partners and stakeholders have a clear understanding of all organizational programs and services, as a way of understanding larger contextual issues that may affect program sustainability. 				
<b>Totals</b>				

**Network for a Healthy California - Sustainability Assessment Tool  
Summary**

	Number Checked for Each Category			
	Strongly Agree	Somewhat Agree	Do Not Agree	N/A
Analyzing Current Processes				
Evaluation/Priority Setting				
Resource and Fund Development				
Marketing/Public Relations				
Preparing for Planning				
	Percentage of Responses by Category			
	Strong	Adequate	Weak	N/A
Analyzing Current Processes				
Evaluation/Priority Setting				
Resource and Fund Development				
Marketing/Public Relations				
Preparing for Planning				