

Sustainability Planning Training Introduction and Preparation

Ohio 21st CCLC Grantees
Pre-Training Conference Call

Goals of the Training

- To introduce participants to tools and materials that will enable them to develop effective sustainability plans.
- To provide support for initial work to begin the planning process

About The Finance Project

- The Finance Project is a specialized non-profit research, technical assistance and training firm for public and private sector leaders nationwide.
- We've provided TA and training on financing and sustainability issues related to afterschool since 1998.
- We have trained 21st CCLC leaders in many states including Kentucky, Michigan, Wisconsin, Oklahoma, Mississippi, New Mexico and Nebraska

What is Sustainability Planning

- The process of sitting down to develop *specific strategies* and an *action plan* to help ensure the long-term sustainability of an initiative
- Includes considering a full range of resources and capabilities – financial, political, administrative, managerial– needed to meet long-term goals

Why Do Sustainability Planning?



- To clarify where you are and where you want to go
- To develop strategies for long-term success
- To provide benchmarks to measure progress
- To demonstrate to partners and other stakeholders the value of your work

Results of Sustainability Planning



- Increases in participation from Board members on sustainability issues
- Increases in and deepening of partnerships and stakeholder groups
- Increases in funding and in-kind support
- Increases in the capacity of program leaders to address sustainability challenges in the future

Key Elements of Sustainability

1. Vision
2. Results orientation
3. Strategic financing orientation
4. Adaptability to changing conditions
5. Broad base of community support
6. Key champions
7. Strong internal systems
8. Sustainability plan

Planning for Sustainability

- Planning to Plan
- Module I: Building a Sustainable Initiative
- Module II: Creating a Vision and Results Orientation
- Module III: Creating a Strategic Financing Plan
- Module IV: Building Organizational Capacity and Community Support
- Module V: Writing the Plan

Training Overview and Structure

- 2 In-Person Training Days with 21st CCLC grantee teams in Ohio. Tailored specifically to each cohort -
 - 1st Year Grantees - March 23rd and May 5th
 - 2nd and 3rd Year Grantees – March 24th and May 6th
 - 4th and 5th Year Grantees – March 25th and May 7th
- 2 Follow-up Conference Calls
 - April 21st
 - June 10th

In-Person Training Format

- **Presentation** to share information and tools from The Finance Project
- **Team Time** to apply information and tailor tools to project needs
- Teams create next steps to complete the work back at home
- **Debrief** with full group for **peer learning and sharing sustainability ideas**

Preparation Steps for the Training

- Identify team members to bring to the training
- Review the Sustainability Self-Assessment Tool and have team members complete before the training
- Gather relevant information to bring to the training such as your program's theory of change/logic model or recent grant proposal

Who Should Attend the Training

- Have working knowledge of the history and current status of the program
- Are directly accountable for the implementation of the program
- Are tasked with implementing the sustainability plan
- Represent partners critical to the long-term success of the program

Self-Assessment Tool

- Diagnostic tool to help:
 - Assess progress
 - Identify strengths and weaknesses
 - Determine where to target scarce resources
- Organized by elements; rank progress toward a desired state
- First step in developing a sustainability plan

Sample: Sustainability Self-Assessment

ELEMENT FOUR: Broad-Based Community Support						
The initiative's leaders take steps to involve the community in their work and gain community support based on the initiative's positive impact on families' lives.						
	1	2	3	4	5	Comments
A. The initiative has a plan to establish a desired identity and reputation within the community.						
B. The initiative's leaders involve recipients of their services in their work to improve service design and delivery and to build ownership and support.						
C. In addition to service recipients, the initiative's leaders involve a diverse set of stakeholders in their work (such as community-based organizations, government agencies, and private businesses) to improve service design and delivery and to build ownership and support.						
D. The initiative's leaders and community partners understand and communicate the work's value for families in its community.						
E. The initiative's leaders collect quantitative and qualitative data to show the value of their work for families.						
F. The initiative's leaders package those data in user-friendly formats and communicate them regularly to the community, key stakeholders, media, potential funders, and others.						
G. The initiative's leaders recognize and reward people who are instrumental in helping achieve sustainability for the work.						

Don't wait to
start
planning for
your
program's
sustainability
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"All I'm saying is now is the time to develop the technology to deflect an asteroid."

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