



Sustainability Planning

*Evaluation and Fund Development
Tips for Sustaining your Programs*

First 5 Yuba

April 8, 2011

C E N T E R F O R C I V I C P A R T N E R S H I P S

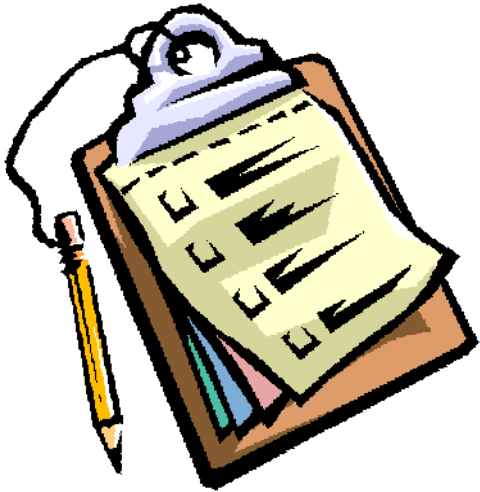


Part of Public Health Institute

Support organization focused
on community/capacity building
and organizational development

C E N T E R F O R C I V I C P A R T N E R S H I P S

Agenda



- What does Sustainability Mean to You?
- Overview of 10-step process
- Fund Development Strategies
 - Evaluation
 - Resource Planning
- Question and answer/ discussion

Objectives



By the end of the session you should have:

- An understanding of the sustainability planning process.
- A set of tools and strategies as they relate to program evaluation and fund development to use in your program sustainability efforts.
- A list of next steps for sustainability planning and implementation.

Introductions

- First name, title, and organization
- What does program sustainability mean to you?
- What are your biggest challenges as it relates to your program sustainability goals?

10 Step Sustainability Planning Process



10 Step Sustainability Planning Process

Step 1

Create a Shared Understanding

The continuation of health or quality of life benefits in a community.



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10 Step Sustainability Planning Process



Step 2

Plan to Plan

Who would you involve?

What process will be used?

How will we coordinate and track our work?

10 Step Sustainability Planning Process



Step 3

Position your Efforts

- Factors that influence the likelihood community improvements will be sustained (Design and implementation; Organizational Setting; Environmental)
- Can work on this step from beginning, through implementation

10 Step Sustainability Planning Process



Step 4

Review Current Picture

1. Current Efforts
2. Funding End Dates
3. Pending Items

Step 4: Pending Items

Some Potential Questions to Ask

- What potential funding sources are available for this effort?
- Can current funding sources be renewed and/or leveraged with existing funding?
- Can in-kind support be garnered from within the community?
- Will a collaboration or partnership better position our effort for sustainability success? Have we identified potential collaborative partners?
- Are there any legislative or other policy efforts that may affect our effort in the future?
- Are there other similar efforts happening in the community?

10 Step Sustainability Planning Process



Develop Criteria

10 Step Sustainability Planning Process



Decide, Revise & Prioritize

10 Step Sustainability Planning Process



Step 7

Create Options

- Where does our current funding come from?
- Where are potential gaps in funding?
- What do our programs really cost?

10 Step Sustainability Planning Process



Step 8, 9, & 10

**Develop,
Implement, and
Evaluate Plan**

Current Sustainability Focuses

- Define what sustainability means for your organization.
- Ensure program evaluation efforts are strategic and provide a big-picture view of the impact to the community.
- Have courageous conversations about evaluation data, organizational capacities, and funding situations - together.
- Include collaboration and partnerships in your fund development strategies.

10 Step Sustainability Planning Process



Develop Criteria

Developing Criteria

Impact

Resources
Needed

Community
Support

Still a
Need

Step 5: Family Resource Center Example

Scale: 1= DEFINITELY NOT 2= PROBABLY NOT 3= PROBABLY YES 4= DEFINITELY YES				
CRITERIA↓ (Enter agreed upon criteria below)	Project/Activity	Project/Activity	Project/Activity	Project/Activity
<i>Example:</i>				
	Medical Insurance Assistance	Medical/Dental Clinic	Facilitated Playgroup	Parent Education/Outreach
1. We are filling a niche	1	3	3	2
2. Measurable improvement in health	4	4	?	2
3. Consistent with our mission	4	4	4	4
TOTALS:	9	11	?	8

Step 5: Develop Criteria to Determine Community Impact

Independently

- Pick the 3-5 most important criteria
- Evaluate/score your programs or efforts against the criteria selected

Small Group

- What criteria did you select?
- Where are your successes in meeting those criteria?
- Where are your challenges in meeting those criteria?



Program Evaluation: *Keep in Mind...*



- Evaluation scores need context; scores indicate “yes or no”, not “good or bad”
- Intermediate benchmarks can and should be used.
- Data can come from anywhere; *trend data*, *partner data*, and *qualitative data* are valid and useful.
- “*I don’t know*” is also data
- When selecting criteria, hold true to your values and mission
- Using weighted criteria is also a helpful evaluation tool

10 Step Sustainability Planning Process



Step 7

Create Options

- Where does our current funding come from?
- Where are potential gaps in funding?
- What do our programs really cost?

Step 7: Identify Funding for Efforts

Funding Sources →	County First 5	Foundation	City of Sacramento	Medi-Cal Reimb.	Private Donations	Local Clinic	Cash Totals	In-Kind Totals
Time Remaining	34 months	16 months	9 months	no end date	no end date	9 months		
Renewal Option?	Unknown	No	Yes?	Yes	Yes	Yes		
Services/Supports ↓								
Medical/Dental Clinic		\$55,000	\$5,000 (in-kind)	\$10,000	\$5,000	\$10,000 (in-kind)	\$70,000	\$15,000
Facilitated Playgroups			\$5,000 (in-kind)		\$5,000		\$5,000	\$5,000
Parent Education/ Outreach Programs	\$30,000				\$2,000 (in-kind)		\$30,000	\$2,000
Cash	\$30,000	\$55,000	\$0	\$10,000	\$10,000	\$0	\$105,000	
In-Kind/Volunteer	\$0	\$0	\$10,000	\$0	\$2,000	\$10,000		\$22,000

Fund Development Strategies

Board Giving

Mail Appeal

Online Fundraising

Foundation Grants

Corporate Sponsorships

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Step 7: Create Options for Maintaining Your Priority Efforts

- What results have we achieved that justify continuing this effort?
- To whom is this effort important (or who benefits) and do we have their commitment to finding resources (not necessarily money) for this effort?
- What cost effectiveness, cost savings or other financial justification can we document?
- What resources (financial and other) are needed to continue?
- What are some possible sources of resources for continuing this effort?

10 Step Sustainability Planning Process



Questions?

köszönöm !תודה *děkuji*

mahalo 고맙습니다

thank you

merci 谢谢 *danke*

Ευχαριστώ شڪرا

どうもありがとう *gracias*