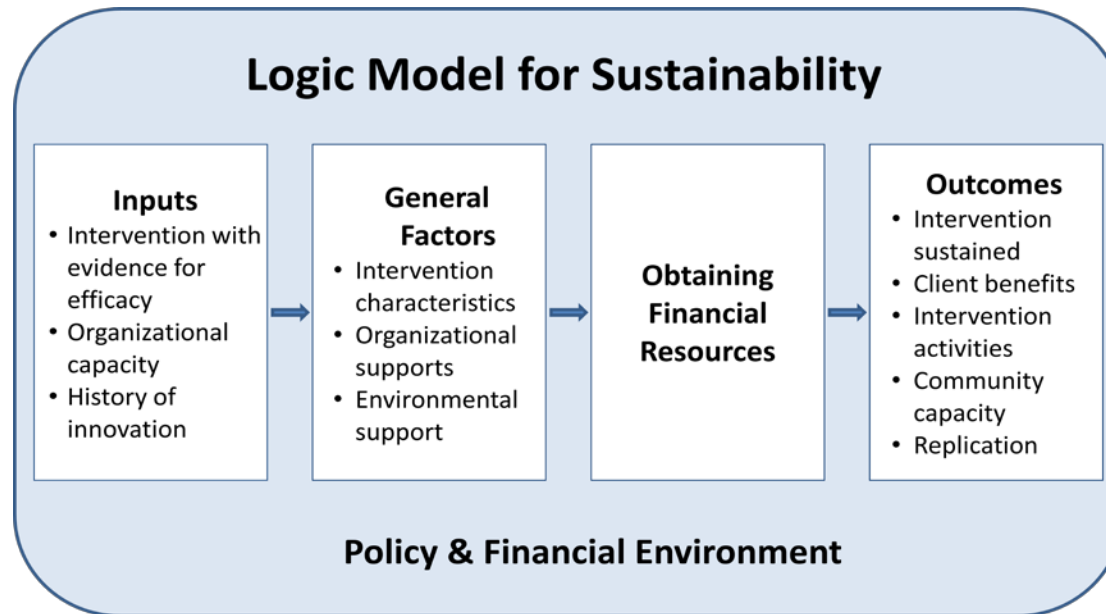


## Sustainability Planning Worksheet



Adopted from Scheirer, M. A. & Dearing, J.W. (2011). An agenda for research on the sustainability of public health programs. *American Journal of Public Health*, 101, 2059-2067.

“The first rule of sustainability is to align with natural forces, or at least not try to defy them.”

- Paul Hawkin, Environmentalist

## A Healthy Community Team

If you've not already done so, begin with identification of potential partners. Ask yourself the questions below and begin by crafting messages that will engage and excite others. Explain how your work is similar/different and learn more about their efforts to identify intersections or alignment of goals.

Who else cares about this work? Who are the community stakeholders that could be interested in this effort?	Why might they be interested? What do they need to know?	What skills and/or resources can they bring to the team?	What will you ask them to do (be on a community team that will.....X)?	If they say "no thank you", why? Is there another way for them to be connected to the effort? Or if they are not active, could they serve in another capacity?

**Note:** The team is small to allow for all members to be actively engaged. This is not an "advisory" – it is a "working group."

Once your team is established, think about the ability of members to work together to complete activities. For each of the five indicators of team health, think of an example that demonstrates the level of health for your team. What are team's strengths? What are areas in need of improvement?

1. **Climate:** What is the emotional climate like for your team? Are team members formal? Informal? Friendly? Competitive? Describe that feeling. Whatever the climate, is it working for members of the team and how do you know? How could it be improved?
2. **Involvement:** Now think about the types of activities the team has conducted recently. This could include resource generation, implementing an EBI, building partnerships or building community awareness. Think about the team members that were involved in each activity. Is everyone finding a place to contribute? If not, how could this area be improved?
3. **Interaction:** Are there subgroups or cliques on your team? Are people listening to and building on the ideas of others? Do all members feel secure in their roles? How do you know? Does anything more need to be done to improve?
4. **Cohesion:** Does your team pull together when needed? Have there been times where everyone worked together to problem-solve or overcome a challenge? Or, did a few members step up and others stood on the sidelines? Is this an area in need of improvement? How could you help team members to work together more closely?
5. **Productivity:** How might you describe your team's ability to complete work? Could it be improved or does the team function well to complete tasks?

List your own community's Social, Economic and Environmental characteristics. If you have a team, think about the potential that exists with partnering organizations. If you don't have a team, refer to your list on page 2 and list potential resources.

	<b>Community Resources / Inputs and General Factors (positive and negative)</b>
<p><b>Social:</b> <i>What social or cultural influences exist in the community that will likely impact sustainability? Ex. Language, ethnic diversity, people available to help, etc.</i></p>	
<p><b>Economic:</b> <i>What are the specific types of funding options that will support or challenge implementation? Ex. Grants, climate for collecting donations, endowments, etc.</i></p>	
<p><b>Environmental:</b> <i>What physical or natural influences will support or challenge the team's efforts? Ex. Location of services, geography, physical structures, etc.</i></p>	

## Sample Resource Assessment Budget: What do you need? What do you have?

This tool, or something similar, could be used to help estimate costs and generate ideas for possible resources during a team meeting.

Budget Item (What will be needed?)	Need & Quantity (How much will be needed?)	Cost	Available Resources (What do we have?)	Other Supports	Remaining Need	Possible Sources	Who Will Contact
<b>Cash</b>							
Implementation by trainers/facilitators (stipend/payment)	2 rounds of implementation	\$300 @ project = \$600	CYFAR and/or other agencies	Team member agency staff	none		
Workbooks and materials	15 workbooks @ class x 2	30 books @ \$5 each = \$150	0	0	\$150	Community fund	Team member name
Community awareness/recruitment	Advertising, posters & radio spots	\$75	0	Printing of posters discounted, Radio is free	\$25 for posters, \$25 for ads in the newspaper	Newspaper donates space	Team member name
<b>In-Kind</b>							
Participant Incentives	Notebooks, pens and coupons	\$10 @ person	0	Restaurant coupons, gas coupons, food	Notebooks and pens	Local business	Team members names
Meeting space	Room for 20 participants (x2)	Donated?					
Volunteers	8 volunteers to conduct activities	Recognition					
Child care	2 child care providers for each session						

1. What is needed to fund the program/service? Be specific.
2. What needs could be met with in-kind resources?
3. If in-kind or volunteers are available, could money be diverted to maximize existing resources?
4. If you were leading a team discussion to generate ideas for new funding sources, what questions might you ask?
5. How can team members help secure funds? What will they need to do the job? (Think about communication strategies, who is best suited to make a contact, what information is needed, etc.)

**Writing a “case statement”** – building a case for why someone would want to invest in this effort and/or in this team effort.

1. What is the team is doing? Who does the team serve? How do they benefit?
2. Does this result in benefits to others? (Hint: Costs to society and/or Public Value.)
3. How is this work different from that of other efforts in the community?
4. Why is this work important? Share the team’s vision for a better future in the community.
5. What research might support this work?
6. Is there anything unique or remarkable about this team and their history so far? What important things have happened along the way?

Write a case statement here:

## Building a Donor Base

To sustain your efforts, you will need to build a donor base in your community. Think about what groups, organizations and businesses could fit into the various categories. Remember that this work could be expanded if used in a team setting.

	List options for your community	Messages that will work best for them!	Platforms that will work best to deliver those messages
1. Corporate Business/ Industry (for-profit)			
2. Foundations (non-profit)			
3. Agencies or Organizations (structured or formal group)			



4. Volunteer groups or clubs (informal alliances with a cause)			
5. Individuals (Do not list names but instead, list the roles or positions of these individuals in the community.)			

**Fine-tune your fundraising message** by thinking through the questions below.

1. What does your audience care about? Is this message relevant to them? In what ways?
2. Does the message include data? Research? Or other compelling information?
3. How does the message connect on a human level? Is it “memorable” or will it make an impression on the listener?
4. How does the message convey a sense of urgency for the listener to take action?
5. Is there an “ask”? Is the request reasonable, specific and something the donor could do?
6. Could the message be rewritten to be more direct and concise?

## Strategy Summary for Sustainability

1. Resource Assessment Planning – what exists and what is still needed?
2. Getting Results and using data for continuous improvement planning.
3. Team Structure and Functions (internal to the team) – What resources can the team provide? Does the team function well together to complete tasks? Does the team represent stakeholder groups that care about our clients?
4. Partnerships and Connections (external to the team) – What resources can partners provide? What relationships can/should be developed?
5. Strategic Communication – What will others need to know about your efforts and needs?
6. Recognition and Rewards – How will you recognize and reward each type of support?

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