Strategy. Capacity. Sustainability.

Bringing the Future into Focus:

A Step-by-Step Sustainability Planning Workbook

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Community Health Systems Development

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Strategy. Capacity. Sustainability.

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INTRODUCTION

Introduction

Over the past decade, sustainability has become the focus for many government agencies and foundations that fund community-based programs and non-profit organizations. Increasingly, funders want to know how organizations and collaborations plan to sustain programs or services beyond the grant period.

The Sustainability of Programs and Services

There are multiple definitions of sustainability used by funders, researchers and community-based organizations. For the purposes of this workbook, sustainability is defined as: *programs or services that continue because they are valued and draw support and resources.*

Sustainability does not necessarily mean that the activities or program continue in the same form as originally conceived, funded or implemented. Programs often evolve over time to adjust to the changing levels of support and needs of the community. Organizations may start with one approach, but end up sustaining a different model of service provision after testing it in the community.

For example:

- A grant may provide "start-up" funds to establish services that are expanded post-grant period.
- An initial investment may fund a model or pilot program from which a new program approach evolves.
- Some grant-funded programs may sustain, but the services provided or the coverage area are scaled back to reflect a reduction in resources to support the program.

A Closer Look…

Examples of Sustainability

A community in the Pacific Northwest used a three-year grant to expand access to primary care services. During the grant period, they worked with community partners to become a designated Federally Qualified Health Center (FQHC) with long-term funding dedicated to sustaining increased access to health care.

A non-profit agency in the Midwest used grant funding to develop and test a new community health worker model that eventually evolved into the centerpiece strategy for the organization's community outreach work. During the grant period, the community health worker program focused on diabetes, providing education and referrals to treatment. During this time, the program staff recognized that most of their clients did not know how to access the health care system or understand what resources were available to them to help manage and treat their diabetes. Following the grant, the non-profit changed its community health worker program to focus on patient navigation for people with chronic disease.

A program that formerly served nine counties reduced their coverage area to two counties. A program that was formerly universally available in a community was limited to those who meet certain risk factors or other eligibility criteria following the grant period. Often, agencies will be forced to prioritize which program components or activities to continue, reducing the scope of their program to match with available resources.

The Sustained Impact of Programs

Most definitions of sustainability, including the one provided in the previous section, focus on the continuity of a service or program. This perspective, focusing solely on the sustainability of programs and services, may understate the full range of impacts that a program may have, and it does not explicitly describe the potential for lasting effects in the community that are distinct from the continuation of a service. There are multiple ways that an initiative can impact a community long after services have been discontinued. This workbook (and the supporting worksheet and template) will guide you through a process of clarifying the long-term impacts that your program can have in the community and what resources will be needed to sustain those impacts.

Sustained impact is defined as: *those long-term effects that may, or may not, be dependent on the continuation of a program.*

These long-term effects may go beyond services that are put into place. As illustrated below, the impacts may include changes in the way agencies work together to serve community members, cultural shifts, practice changes, policy changes, and changes in the knowledge, attitudes and behaviors of community members and providers.

A Closer Look…

Examples of Impacts

On-going impacts of collaboration: Through the implementation of a new project, agencies can develop a new way of working together to serve community members; new lines of communications are established, interagency referral mechanisms are built and the culture of collaboration in communities may be changed.

Improved service models: Agencies may develop and implement new practice standards that are institutionalized following the end of a grant period. For example, new programs may result in a new model for caring for those with chronic diseases, or training and employing community health workers to help patients better navigate services and effectively manage their illnesses.

Increased capacity in local systems: Grant funds can be used to build the capacity of the local health and human service infrastructure (e.g., establishing an HIT infrastructure), develop curricula (e.g., a diabetes self-management training program that can be used by nurses or community health workers, or a physical activity program that can be used by math and science teachers in the classroom), and purchase medical and screening equipment. These resources, once created or purchased, remain in the community and have lasting impact.

New policies to sustain impact: An organization or collaboration may engage in local- or state-level advocacy to effect change in a policy that supports the services provided through their programs. Those policy changes (e.g., a change in Medicaid reimbursement or the establishment of a hospital taxing district) have an enduring impact on the way services are delivered and financed.

Changes in knowledge, attitudes and behaviors: A community may see impacts that are beyond services and infrastructure. As a result of an outreach program, public awareness of a health issue may increase, and cultural attitudes about certain health behaviors or illnesses may shift. For example, a program to integrate mental health services into the primary care setting may help reduce the stigma associated with accessing mental health-related services.

The Need for Sustainability Planning

Because you care deeply about what you do, it can be difficult to make decisions about how to move forward with your program after the grant period ends. These decisions have implications for the people you serve as well as the staff and members of your consortium. The process of creating a Sustainability Plan clarifies the importance of your program in the community. It allows your consortium partners and stakeholders to make informed decisions about the future of the program. The sustainability planning process engages your partners in identifying funding strategies – which may include committing their own resources – to sustaining the program long term.

A Sustainability Plan is a tactical necessity. It will help you determine which program activities should continue beyond the grant period and connect the operating costs of those activities to funding strategies. It is the culmination of your work thus far and brings to bear your data, resources and strategies to guide your efforts as you progress.

Using this Workbook

This workbook will take you through a step-by-step sustainability planning process. At times, you will be directed to have conversations and make decisions with your consortium/network partners. At other times, you will develop budgets and enter data into spreadsheets. Instructions are provided for completing each step, and a case study illustrates the process throughout. When you see "Your Turn," you will know that it is time to provide the data and information for your own program. Additionally, you will come to a "Decision Point" at the end of each step that requires your partners to reach consensus on key issues in order to proceed.

As you make your way through this workbook, you will complete planning and budget worksheets, write narratives about your program and document the decisions that have been made. Clicking on the links in this workbook will take you to either:

- An Excel planning worksheet to enter numerical information
- A Word document that eventually will become your final Sustainability Plan

NOTE: If you change the file name of the Sustainability Planning Worksheet (Excel file) or the Sustainability Plan (Word document), the links in this workbook will not work.

When you have completed all the steps in this workbook and entered all the required narratives, budgets and data, you merely have to print the Sustainability Plan Word document. With minor editing and adding your own personalization to the file, you will have a completed Sustainability Plan.

A Case Study

To help you work through your own program, the following case study has been adapted to illustrate each step. This case study will be used throughout the rest of the workbook.

Grantee	Blue Mountain Clinic, a Federally Qualified Health Center in the Midwest
Program	The Community Diabetes Prevention and Management Program (CDPMP) serves adults in two counties. The CDPMP provides prevention education classes for pre-diabetics, diabetes self-management classes and the provision of clinical services to those who are diagnosed with Type 2 Diabetes.
Staff	The Blue Mountain Clinic employs the certified diabetes educator who conducts the self-management classes and the prevention education classes. In addition, the Blue Mountain Clinic employs the Program Coordinator and Administrative Assistant to coordinate all of the CDPMP activities and provides administrative and programmatic oversight for the program.
Consortium	The consortium includes the FQHC, two health departments, the hospital, the Cooperative Extension Service, and the local YMCA. The health departments in the two counties in the coverage area provide referrals to the clinical services and "host" the diabetes self-management courses and prevention education classes at their facilities. The local hospital, Cooperative Extensive Service, and the YMCA support many of the community outreach and education efforts that the CDPMP implements.
The partners meet monthly to discuss the activities of the CDPMP, share information, and to ensure that patients are receiving the necessary referrals to clinical and other support services.	

GETTING READY

Getting Ready

In preparing for your sustainability planning process, your consortium should reflect on your program, celebrate your successes and consider the place your program now has in your community. You will want to revisit your original needs assessment that documents the underlying need your program was designed to address, review your program outcomes and consider the sustained impact resulting from your efforts.

Assess the Continuing Need

You most certainly developed your program to address an unmet need in your community. Over the course of your program, circumstances in your community may have changed. To establish the current situation, have your partners discuss these questions:

- *What led us to develop our program? What factors indicated a need for our work?*
- *Has that need changed? Are the circumstances in the community different now than when we began? Is the need less or more intense?*
- *Are there new programs/organizations – other than ours – that are trying to address the need?*
- *Based on our current understanding of the need, is there a reason for us to continue our current program as is?*

Refer to the Sustainability Plan template on page 38; write a summary of your thoughts about the current need and why your program should continue to exist **in Section I: History/Background.**

Review Your Program Outcomes

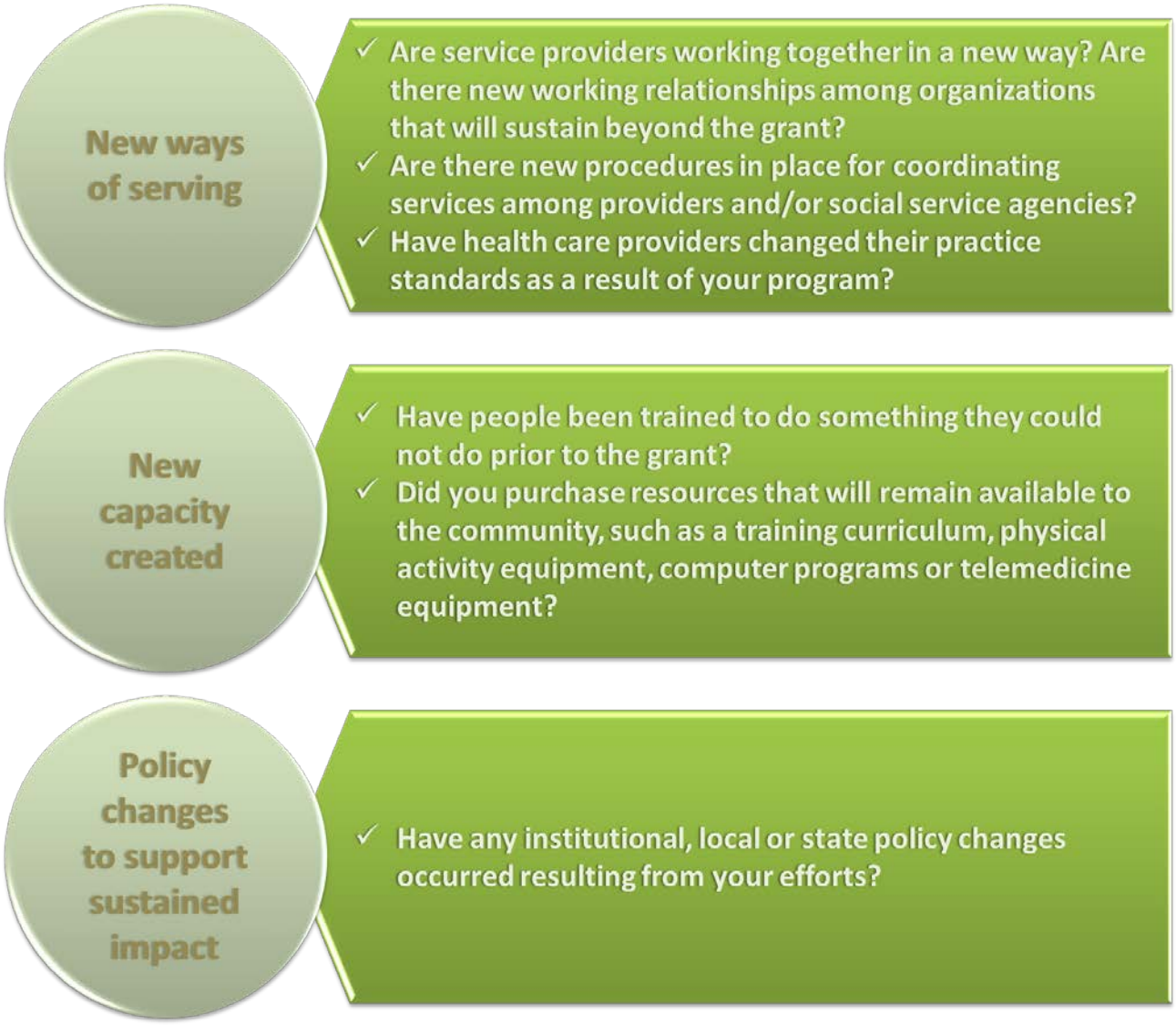
Now is the time to realistically take stock of the effect your program is having on the people you are serving and the community as a whole. Gather your evaluation data so your partners can have a true picture of what has been accomplished. Here are some questions they should consider:

- *Were we able to accomplish what we planned to do?*
- *Were we able to implement the work plan as we envisioned? If yes, what has contributed to our success? If not, why not?*
- *Are we having positive outcomes? If yes, what has contributed to our success? If not, why not?*
- *What makes us most proud about what we have done?*
- *What lessons have we learned?*

Refer to the Sustainability Plan template on page 38; write a short summary of your overall program and your accomplishments **in Section I: History/Background.**

Reflect on Your Sustained Impact

Refer back to the section of the Introduction that explains the concept of "sustained impact." As a reminder, sustained impact is defined as those long-term effects that may or may not be dependent on the continuation of a program. Experiences of past ORHP grantees indicate that almost all grant-funded programs leave some type of legacy in the community even when the direct services are not sustained. To discover the *sustained impact* of your program, your partners should contemplate the following questions:



As you consider your sustained impact, it is important to think about what might be needed for these impacts to endure in the community. You will likely need to identify dedicated resources (including financial, human and other) to sustain those long-term impacts. For instance, will ongoing training be required to maintain staff capacity when there are changes in personnel? Will someone need to continue to facilitate meetings to continue the coordination of services? How will equipment be maintained and serviced over the long term?

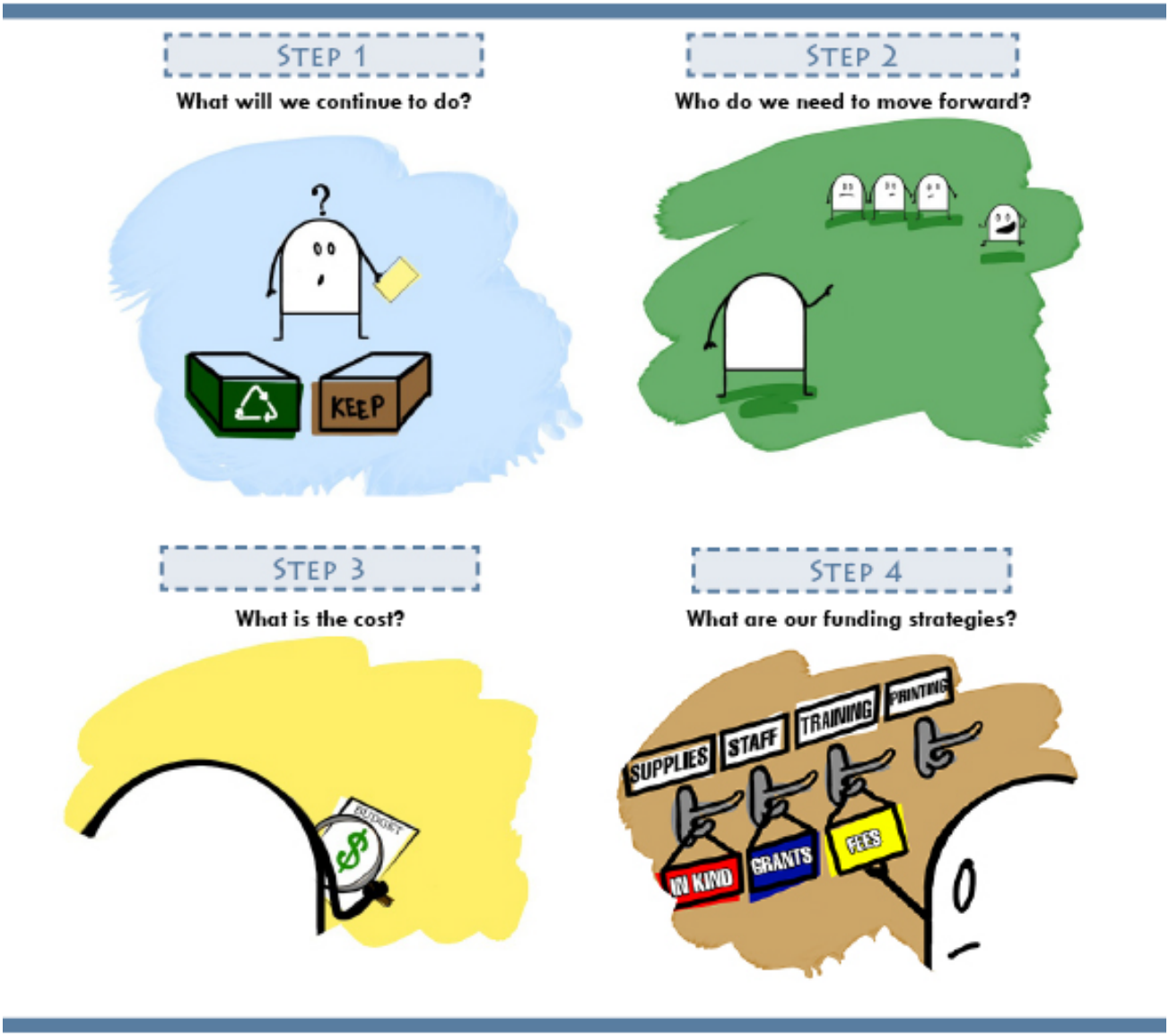
Refer to the Sustainability Plan template on page 38; write a short summary of the sustained impacts resulting from your ORHP grant-funded program. Include your plan for ensuring that these impacts continue **in Section I: History/Background.**

SUSTAINABILITY PLANNING: STEP-BY-STEP

Sustainability Planning: Step-by-Step

Now that you have reflected on what you have accomplished and discussed the continuing need for your program, it is time to begin your sustainability planning process.

The next sections of this workbook will guide you through four steps that will prepare you to produce your Sustainability Plan for program services or activities. In working through the steps, you will answer four key questions.



STEP 1: WHAT WILL WE CONTINUE TO DO?

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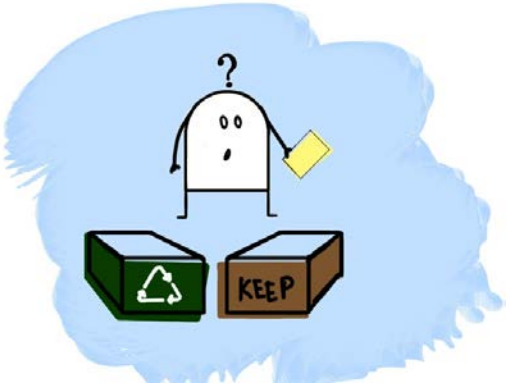


During this step you will:

- Organize and review data needed for decision making
- Establish criteria to determine which program activities should continue

Dissect Your Program

Begin by identifying the various activities that you have undertaken through your ORHP grant. An activity is a group of events, such as a series of health promotion/disease prevention classes, clinical screenings, nurse home visits or the provision of clinical services. Each activity feeds into the goals and objectives of the overall program. Your program may have one main activity or multiple activities.

Here is the example from our Community Diabetes Prevention and Management Program (CDPMP) case study:

Dissect your program as illustrated above.

Organize and Review Your Data

Next, you want to get a clear picture of the overall cost of implementing each program activity as well as the cost for providing services for one individual. To do this, begin by breaking down your program's annual operating budget by activity, similar to our CDPMP case study.

Community Diabetes Prevention and Management Program Case Study			
Expenditure (First 2 years of grant)	**Self-Management Education**	**Primary Prevention Classes**	**Screening/Clinical Services**
Staff/Benefits	$48,265	$24,850	$ 77,745
Office Space	$3,200	$1,600	$600
Facility Rental	$2,400	$2,400	
Booklets/Brochures	$4,000	$1,200	
Gym Memberships	$7,125	$2,125	
Incentives	$4,000	$2,000	
Food	$4,500	$1,500	
Medical Supplies			$6,500
Computer Equipment	$3,375	$1,125	
Office Supplies	$1,500	$750	$250
Postage	$350	$200	$150
Total Cost	**$78,715**	**$37,750**	**$85,245**

Create a spreadsheet that allocates your expenditures by activity.

Enter a total annual cost for each line item. Certain costs may need to be distributed across all program activities based on the percentage of time and effort committed to the various activities. For example, distribute the total cost of salaries and benefits across the program activities based on the level of effort that each staff person has devoted to that activity.

You should allocate costs for all expenditures related to the operation of your program activity – even if the item was provided in-kind. For example, if space for program staff was provided by the grantee agency, the cost of that office space should be estimated and included in the budget.

Next, you want to calculate the cost per individual served by dividing the total cost of the activity by the number of individuals that received services during that same time period. Our CDPMP case study looks like this:

Community Diabetes Prevention and Management Program Case Study			
	Self-Management Education	**Primary Prevention Classes**	**Screening/Clinical Services**
Total Cost	$78,715	$37,750	$85,245
Number served	400 adults	100 adults	70 adults
Cost per Individual	$197 per adult	$378 per adult	$ 1,218 per adult

Calculate your cost per individual served.

There is one more piece of information necessary for decision making. It is your program's evaluation data. Gather and summarize your evaluation data for each activity. If possible, provide any return on investment data to show the effectiveness of each activity. Look again at our CDPMP case study.

Community Diabetes Prevention and Management Program Case Study			
	Self-Management Education	**Primary Prevention Classes**	**Screening/Clinical Services**
Total Cost	$78,715	$37,750	$85,245
Number served	400 adults	100 adults	70 adults
Cost per Individual	$197 per adult	$378 per adult	$ 1,218 per adult
Evaluation Findings	92% improved their knowledge of the recommendations for self-management. 45% of the participants have seen a 0.5% decrease in their A1c and 38% have achieved at least a one inch decrease in their weight circumference.	Studies have shown that people with pre-diabetes can prevent or delay the development of Type 2 Diabetes by up to 58% through weight loss and regular exercise. Six months post completion in the DPP classes, 56% of the participants reported sustaining compliance with their diet and exercise plan.	Of 232 patients referred for testing, only 70 adults sought follow up treatment. 70 received A1c tests, 32 received foot exams, and seven received eye exams.
Return on Investment	Medical ROI: $17.77 Economic Productivity ROI: $8.38 Total ROI: $26.15	Unknown	Unknown

Add your evaluation data to your spreadsheet.

Set Criteria for Continuation*

Now that you have gathered and organized all of the necessary data, it is time to call a meeting of your consortium/network to establish the criteria you will use to determine which of your program activities should continue.

By establishing criteria for making decisions about which of your activities to continue, you can make an often subjective process more objective. Developing criteria that match the values and priorities of your partners will help to ensure their commitment to the decision-making process and the eventual outcome of the priority-setting. Each consortium/network will have its own criteria by which to judge their activities. For instance, your partners may be more focused on the relevance of the activity to the current need instead of the cost-benefit of the program to the health care system.

Once you have settled on three to four criteria, you will rank your program activities based on those criteria. You can use the following scale to rank the activities.

1	*Definitely does not meet this criterium*
2	*Probably does not meet this criterium*
3	*Probably meets this criterium*
4	*Definitely meets this criterium*

A Closer Look…

Potential Criteria to Consider

- A positive impact on individuals
- A positive impact on the community
- Cost effectiveness
- A positive return on investment
- Sufficient community support
- Available resources for continuation

**Adapted from Center for Civic Partnership, Sustainability Toolkit*

As a guide, review the criteria and activity rankings completed by the partners of our CDPMP case study:

Community Diabetes Prevention and Management Program Case Study			
Criteria	**Self-Management Education**	**Primary Prevention Classes**	**Screening/ Clinical Services**
The program is having a positive impact on the health of participants.	4	4	2
The benefits justify the cost of the activity.	4	2	1
There is broad support for continuing the activity.	4	3	2
Total	**12**	**9**	**5**
Continue activity?	**Y**	**N**	**N**

Based on their data and criteria, the consortium partners determined that only the diabetes self-management program should be continued.

Have your partners review the chart that summarizes your program's cost by activity, cost per individual and evaluation findings. While cost and effectiveness are essential factors in making difficult decisions about how to move forward, there are likely other criteria that will influence your partners' decisions related to the impact of the program and its place in your community. Let your partners determine their own set of criteria for making decisions about program continuation. It is best to limit the criteria you will use to the three or four most important factors.

Working as a group, have your partners rank each activity against your established criteria.

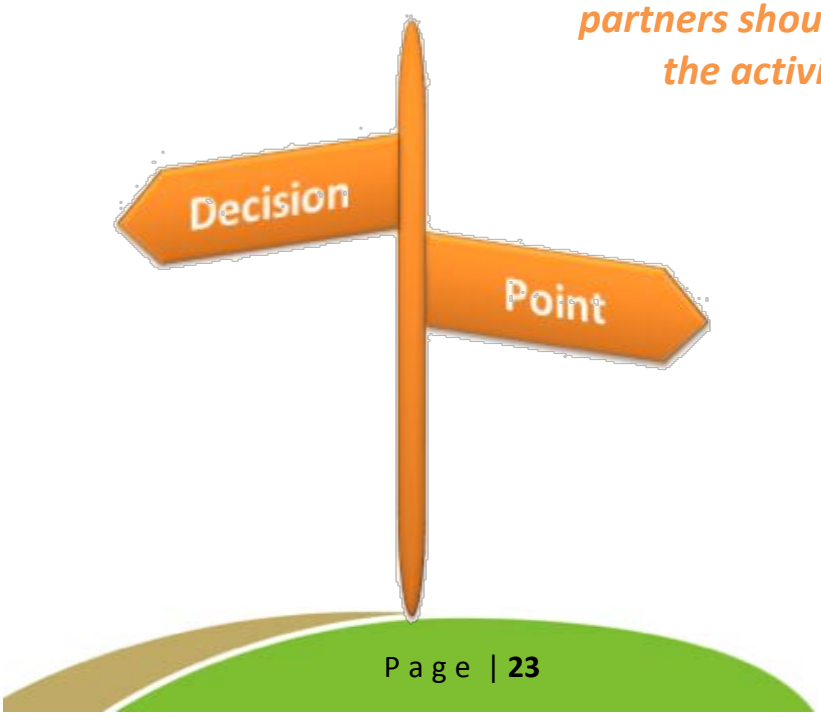
Using the example on page 21, create a spreadsheet to enter assess your activities by your own criteria. Using the four-point scale, enter your partners' rankings of each of activity. Once you have totaled the rankings of each activity, you will have a clear, objective picture of how your partners view your activities.

Decision Point #1

Your partners now have the first decision to make in the sustainability planning process. Reflect on the data you have organized and the criteria rankings for each activity to determine which activity/activities to continue beyond the grant period.

Using the Sustainability Plan template on page 38, write a description of the activities you have prioritized for continuation and a justification for their prioritization in **Section II: Moving Forward**. As you move through the remaining three steps, you may return to this section to revisit this decision. You will be prompted to update this section accordingly.

At the end of this discussion, your partners should be in agreement about the activities to be continued.



STEP 2: WHO DO WE NEED TO MOVE FORWARD?

STEP 2: Who Do We Need to Move Forward?

During this step you will determine:

- How effectively your program has been managed
- How efficiently your program has been staffed
- How well your consortium has collaborated in implementing the program

The staff responsible for program implementation and the consortium members who provide program guidance are key factors in the ultimate success or failure of a program. In planning for sustainability, it is important to determine the most effective structure for program continuation.

During this step of the sustainability planning process, you will assess different aspects of your program structure and determine what changes may be needed to achieve maximum efficiency. This can be a difficult conversation because you may have to make hard decisions about how many and which staff will be needed to support the activities that you have prioritized to sustain. Most likely, you will want someone from outside your consortium and program staff to facilitate this conversation.

As a starting point, it may be helpful to make a quick assessment of three key features of your program structure:

Management/ Coordination: The method you have utilized to oversee the various components of your program.

Staffing Structure: The number and function of current staff.

Collaboration Among Partners: Scope of partnerships, role of partners, communication among partners.

Questions to Consider

The following questions will help you make decisions about how to move forward. These decisions are important because the answers will impact the budget you will develop in Step 3.

Management/ Coordination

- ✓ What has worked well regarding the management and coordination of our program?
- ✓ What could be improved?
- ✓ What management functions will be required to sustain our prioritized activities?
- ✓ What is the best strategy for managing these functions?
- ✓ Do we need to employ a Project Coordinator, or can the management/coordination role be handled by project staff or undertaken by consortium partners?

Staffing Structure

- ✓ What expertise is needed to continue the activities we have prioritized to sustain?
- ✓ Can some aspects of the prioritized activities be absorbed by our consortium partners?
- ✓ Can any functions be undertaken by volunteers rather than paid staff?
- ✓ What paid staff will be necessary to successfully continue our prioritized activities?
- ✓ Who will employ the paid staff?

Collaboration Among Partners

- ✓ Does each partner have a clear role to play, and are they fulfilling that role?
- ✓ Are our partners' expertise/contacts being used to the fullest?
- ✓ Is communication and coordination among our partners running smoothly?
- ✓ Do we need to continue our consortium in order to successfully sustain our prioritized activities?
- ✓ If so, are the partners we have the right partners? Do we need new or different partners?

Based on your conversations, think about what changes may be needed for your program to sustain the activities you have prioritized for continuation. You may need to make modifications to the management, staffing and collaboration for your program, and it may be necessary to eliminate some positions or partnerships. The partners of the CDPMP made these decisions regarding the continuation of their activities. (As a reminder, the consortium decided to eliminate the diabetes prevention classes and the clinical screening/services.)

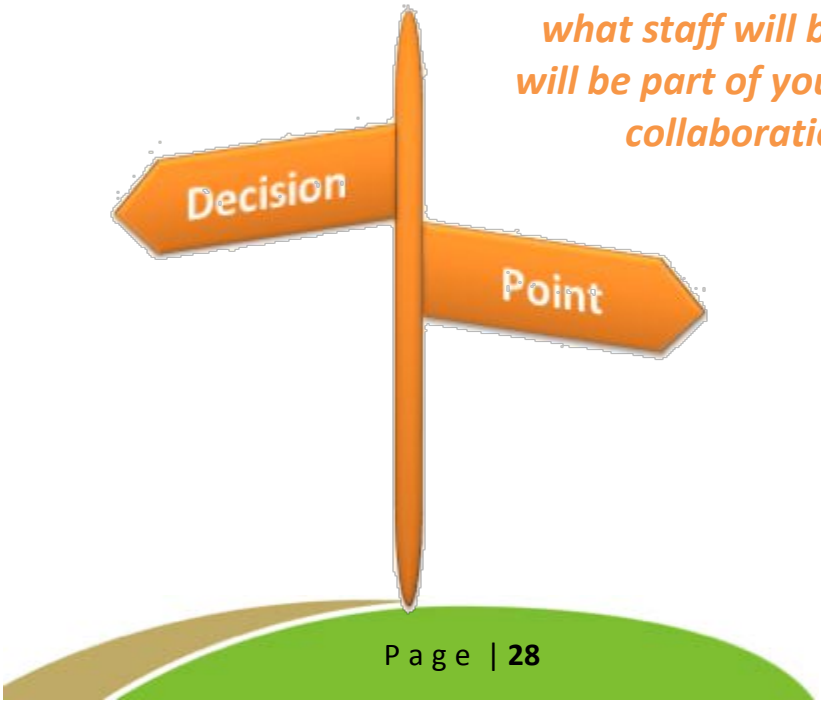
Community Diabetes Prevention and Management Program Case Study			
Aspects of Program Structure	**Leave As Is**	**Make Modifications**	**Eliminate**
Management/ Coordination	Consortium to continue program oversight	Nursing Manager from Blue Ridge Clinic to supervise diabetes educator	Program Coordinator position
Staffing Structure		Cover increased percentage of time for diabetes educator	Administrative Assistant Position
Collaboration among Partners	Continue with current partnerships		

Create a spreadsheet about the management, structure, and collaboration required for your program.

Decision Point #2

Refer to the Sustainability Plan template on page 38, for **Section III: Program Structure** write a short summary of the management structure and the collaboration needed for the program moving forward. Briefly describe the staffing plan for the program and which partners will be engaged in the effort. Be sure to describe the role that each partner agency will have in the collaboration.

At the end of this conversation, you should have made decisions about how the program will be managed moving forward, what staff will be needed, which partners will be part of your consortium, and how the collaboration will be structured.



STEP 3: WHAT IS THE COST?

STEP 3: What is the Cost?

During this step you will determine:

- The line item budget for each of your prioritized activities
- The overall cost to continue your program

Developing Budgets

Having a clear idea of the cost of sustaining your prioritized activities is an essential part of the sustainability planning process. You will want to project your costs for a minimum of three years so you get a complete picture of the total cost of the activity, including one-time cash expenditures, on-going operational expenses, etc. Developing a line item budget for each activity is necessary for determining your funding strategies in Step 4.

Review the budget from the CDPMP case study.

Community Diabetes Prevention and Management Program Case Study				
Activity: Self-Management Education	**Year 1**	**Year 2**	**Year 3**	**Total**
Staff	$25,300	$26,059	$26,841	**$78,200**
Office Space	$1,600	$1,600	$1,600	**$4,800**
Facility Rental	$1,200	$1,200	$1,200	**$3,600**
DSME Booklet	$4,000	$1,000	$1,000	**$6,000**
Incentives (Gym memberships)	$2,734	$2,733	$2,733	**$8,200**
Incentives (Other)	$2,000	$2,000	$2,000	**$6,000**
Food	$1,834	$1,833	$1,833	**$5,500**
Equipment	$2,500	$500	$500	**$3,500**
Supplies	$734	$733	$733	**$2,200**
Total Cost	**$41,902**	**$37,658**	**$38,440**	**$118,000**

Many of the line items are divided evenly among the three years, as those spending levels are relatively stable over time. The organization calculated a three-percent cost of living adjustment for salaries over the three years. Purchases of equipment and DSME booklets require an initial larger cash outlay and smaller budgets in subsequent years to replenish supplies.

As you do your own three-year budgets for each of your prioritized activities, think about which expenses you will incur once and which expenditures will be on-going throughout the three years. Be realistic in your forecasting, but include a cushion for unexpected expenses.

Develop a line item budget for each of the activities/services to be sustained. The "TOTAL" rows for will give you the overall annual and three-year budgets for your prioritized activities/services.
NOTE: Once you have completed your spreadsheet, copy-paste it into your final Sustainability Plan document under Section IV.

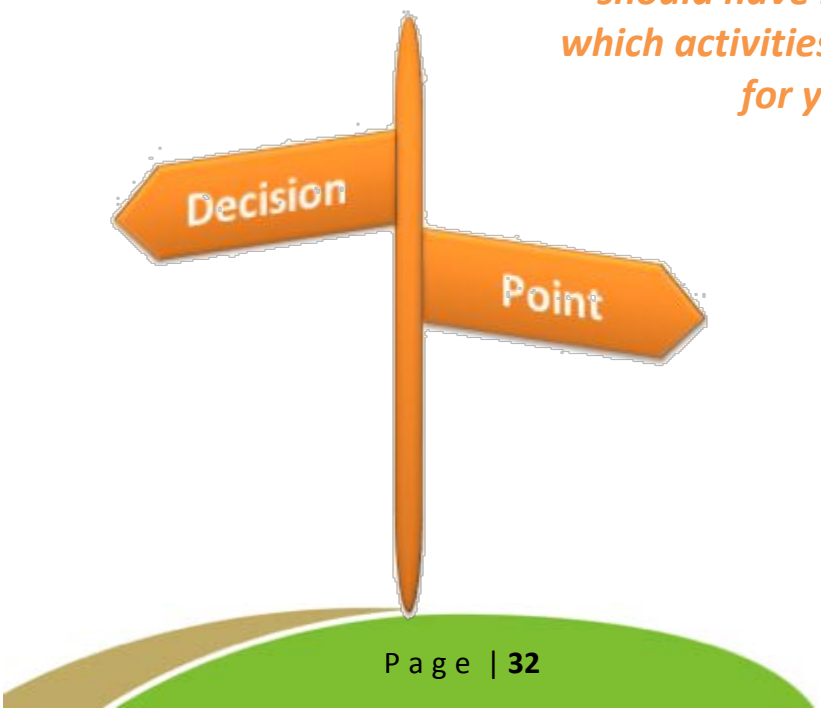
Decision Point #3

Remember, you first prioritized these activities based on the criteria that you and your partners agreed was most important. Going through the exercise of projecting costs and establishing budgets may lead you to take a second look at your prioritized activities using the lens of cost. With this new information, you may have to make a different decision.

- *Based on our projected three-year budget, is it possible to successfully generate the revenue/support needed to sustain all of our prioritized activities?*
- *If it is not financially feasible to continue all of our desired activities, which ones have the greatest priority?*

If necessary, go to **Section II: Moving Forward** to rewrite your description of the activities to be continued.

At the end of this conversation, you should have made decisions about which activities are financially feasible for you to sustain.



STEP 4: WHAT ARE OUR FUNDING STRATEGIES?

STEP 4: What Are Our Funding Strategies?

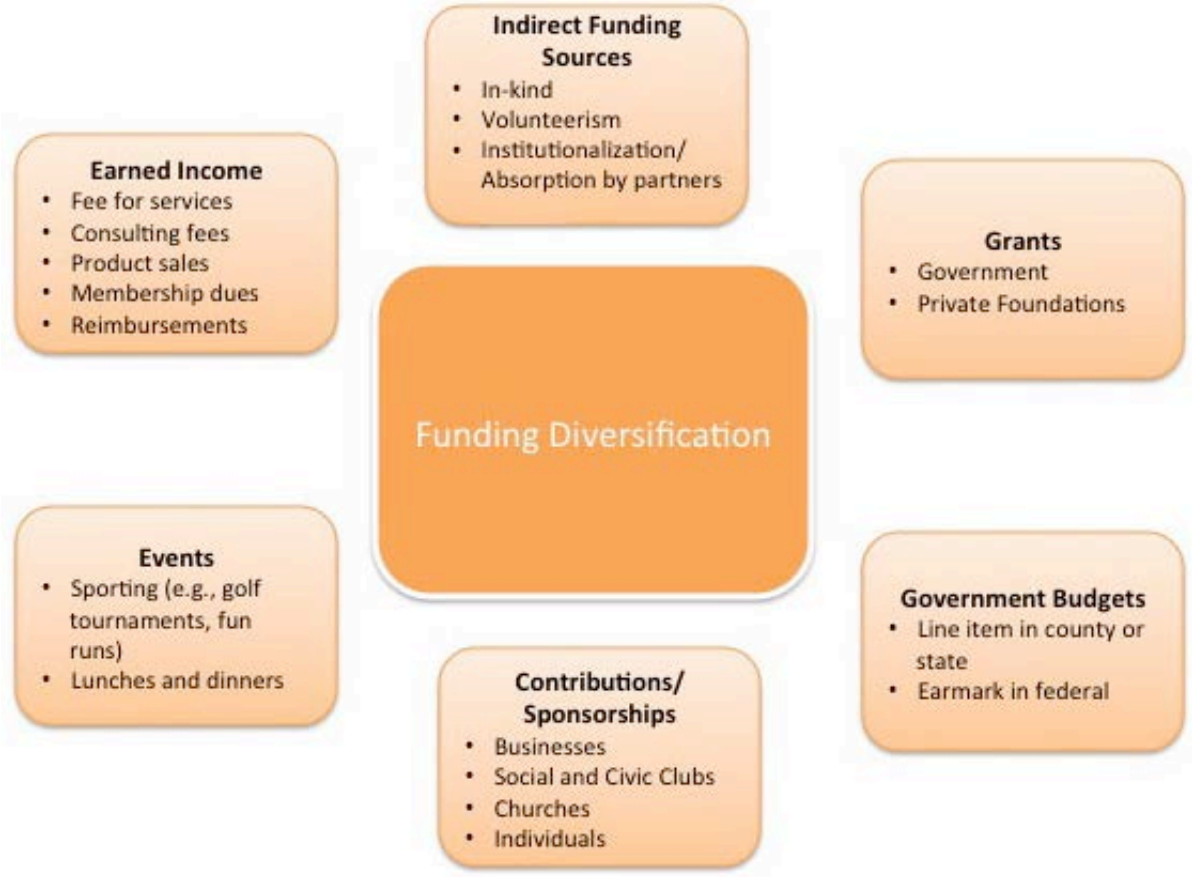
During this step you will:

- Determine your funding strategies
- Identify potential funding sources

Supporting Your Activities

We will begin by reviewing the range of methods for supporting your activities. As you look at the diagram below, think about the local sources of funding available to you within each category. Brainstorm with your partners to make a list of possible funders/supporters for your program. Be as specific as possible. For instance, do not list "businesses." Instead, include the names of actual businesses in your community that you can reach out to for support.

Sustainability heavily depends on diversification of funding sources. You will want to identify potential sources from a variety of methods. Remember that many past grantees have sustained their programs through the in-kind support of consortium partners. As a part of your sustainability planning process, you should discuss the role that your partners can realistically play in the long-term support of your prioritized activities.



Going back to the CDPMP case study, consider the funding strategies that this grantee developed for sustaining their program. The consortium not only wanted to diversify funding sources but also identify different types of strategies to support the activity beyond grant funding. Blue Mountain Clinic was able to secure commitments for in-kind support from each of the consortium partners to support the cost of space, incentives, food and supplies. In addition, they projected that a significant portion of their staff costs (to cover the salary and benefits of the diabetes educator) would be covered by reimbursements from Medicare. They decided to charge participants a small fee to cover the cost of the DSME booklets. Finally, the consortium partners agreed to undertake a fundraising campaign to solicit contributions and grants from local charitable foundations to help cover the salary of the diabetes educator.

Community Diabetes Prevention and Management Program Case Study		
Activity: Self-Management Education	**Three-Year Budget**	**Funding Strategy**
Staff	$78,200	$37,500 – Medicare reimbursement $40,700 – Additional grant funds
Office Space	$4,800	Donated by FQHC
Facility Rental	$3,600	Donated by Health Department
DSME Booklet	$6,000	Charged to participants
Incentives (Gym memberships)	$8,200	Donated by YMCA
Incentives (Other)	$6,000	Contribution from hospital
Food	$5,500	Provided by Cooperative Extension Service
Equipment	$3,500	Donated by YMCA
Supplies	$2,200	Donated by FQHC
Total Cost	**$118,000**	

On your spreadsheet, add your line-item funding strategies for each activity to be sustained.

Then, with the perspective of your identified funding strategies, it may be necessary to assess the feasibility of continuing your prioritized activities one last time. Look across the funding strategies for each activity. Highlight the strategies that will require you to conduct a fundraising campaign or conduct a fundraising event. Total the amount of money your consortium will be required to generate from each of the sources listed. **NOTE: Once you have completed these tables, copy-paste them into your final Sustainability Plan document under Section V.**

Decision Point #4

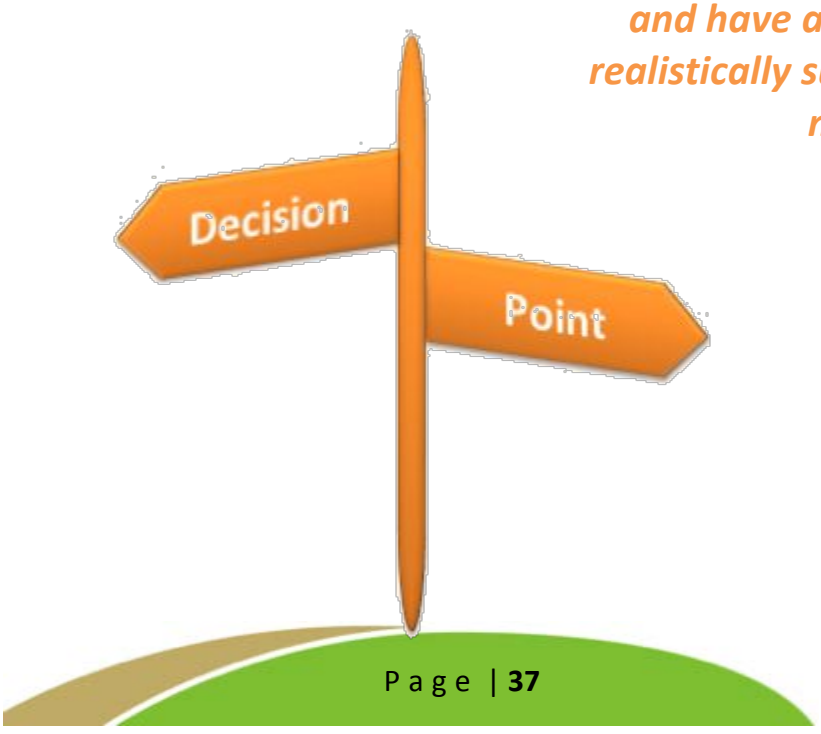
Have your partners discuss the following questions:

- *Are there realistic sources to generate the required revenue?*
- *Can we raise the money we need in the time frame that is necessary for us to sustain our work?*
- *Do we have the capabilities to be successful in our fundraising efforts?*

Depending on your answers to these questions, you may have to reconsider the feasibility of sustaining all of your prioritized activities, or you may have to consider making adjustments to the scope of your efforts in order to reduce the costs that will result in an achievable fundraising goal. Before proceeding with writing your Sustainability Plan, your partners should be confident in their ability to generate the funding needed to sustain your efforts. You may determine that it is not realistic for you to continue all the activities that you had hoped. If necessary, go to **Section II: Moving Forward** to rewrite your description of the activities to be continued.

Refer to the Sustainability Plan template on page 38, **Section V: Funding Strategies;** after your tables write a narrative that explains your funding strategies for continuing your prioritized activities.

At this point, your partners should have determined the activities to be continued, know the cost for continuing those activities, and have a funding strategy that will realistically support your activities for the next three years.



Producing the Sustainability Plan

By completing the various activities in this workbook, you have all of the data and information required for your Sustainability Plan. All you need to do is record your decisions and compile the completed worksheets into a composite document. The outline below serves as the framework for your Sustainability Plan.

Next Steps…

Creating Your Plan

I.	**History/Background** *(Draw from your work in the Getting Ready section.)*
	• Describe the community need that led to the initiation of this organization/program. • Provide a brief summary of your program and the outcomes you have achieved. • Discuss the sustained impacts of your efforts.
II.	**Moving Forward** *(Draw from your work in Step 1.)*
	• Describe program activities you will continue. • Provide justification for their continuation.
III.	**Program Structure** *(Draw from your work in Step 2.)*
	• Describe the partnerships, staffing and oversight that will be needed to support the continuation of the identified activities.
IV.	**Continuation Budget** *(Draw from your work in Step 3.)*
	• Include a three-year budget for each activity.
V.	**Funding Strategies** *(Draw from your work in Step 4.)*
	• Describe the strategies you will use to sustain each activity. • Identify potential sources of support.

It is important to remember that the work of sustainability is never done. You and your consortium partners will continue to seek out support and new resources, as well as identify more efficient ways of achieving impact in your community. Your Sustainability Plan is an initial roadmap to help guide your next efforts, which should include developing a funding plan and/or a business plan.

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