

April 2, 2014

Well, good morning everyone. I'm going to dive into the meet of some of these other resources, the assessment and the resource guide and we are going to do a very fast overview of what you kind of have in your binders there. So, as Sabrina mentioned this building sustainable programs resource kit is really the framework which you all heard on the webinar in early February, hopefully you had a chance to review it before coming here but that's also available in your binders on tab 5 and then the brunt of this workshop is to really focus on the assessment and the resource guide. The assessment is really the next step from building on the understanding the concepts from the framework and the research behind the eight factors of sustainability. The assessment really helps you gather where you stand on that continuum sustainability. Its fashion in a way that matches the eight factors presented in the framework and then builds directly into the resource guide. The resource guide is really your nuts and bolts, it's the tools that will help you in your sustainability planning and I'm going to talk in more detail about each of these. The framework as I mentioned is that research and literature contacts behind the eight factors of sustainability. I am not going to go into a lot of detail, the eight factors you probably are familiar with, but each factor has, you know, keys to success to better understanding what that means to create an action strategy for instance. And the assessment, the assessment is in two occasions in your binder. It's in the resource guide which is tab 6 on Page 135, but there is also a fresh copy which you may want to use later in the day's activities in tab 7, so the assessment as I mentioned follows the framework in the eight key factors of sustainability. It 's intention is to help you gage where you are in your planning process and to help you plan where you may be need to focus on particularly here at this workshop but as you go back home as well. We also hopefully help you highlight some places where you are particularly strong and we encourage you to highlight those and share with one another and bounce ideas off of one another. The assessment is meant to be taken after you have had a chance to review the framework, see have a little bit of contacts behind what these factors mean and what we are really trying to get at, then before you dive into the resource guide, as I mentioned the resource guide is that nuts and bolts and the assessment can really help you guide your use of the resource guide. We will talk a little bit more about that in a few minutes. We hope that you will take the assessment at least annually, it's a good idea to always understand where you are at and your sustainability planning you can take it as often as you want and however you want. Individually as staff members and then come together and talk about it or as a team and work through it together. Both internal and external partners can also be a part of that process. So I'm going to jump in to the resource guide. The resource guide is tab 6 of your binders and there is a lot of information in that, its 170 pages of a lot of information and it has activities and just to write in side bars that you can write in and take notes and you know, this is really the guide for helping you ask some questions and answer questions. As I mentioned, it has those eight key factors and we are going to go over each of the

factors and sort of a little bit more of context about what each of those mean. Each of the factors have an overview, the learning objectives, the little note about why this is important, the critical action steps of getting to those main factors as well as activities and worksheets. The activities and worksheets follow each of the eight factors. In addition to that we have set of worksheets before the factors begin, so these are around Page 29 and I'm going to talk about them in the next slide I believe, but they are really to help you sort of start that conceptual thinking, so bringing a lot just through what OAH's process was in helping think about what is sustainability mean for OAH. These first two activities are really to help you get to start thinking about what is sustainability mean for your programs and your services and the people that you are, the needs that you are meeting within your communities. The resource guide is meant for you to take and use however you see fit for your programs. There are things that probably don't match perfectly with your programs and there will be things that hopefully do. Please modify it as you see fit share it with one another, bounce ideas off of one another. If the questions don't resonate with you talk with your team members, your community partners, your peers here, ask them what they are thinking about particular things. We want you to take this an adaptor and mold it for your own purposes. It's just a tool for you to have sort of easy access to how some of these things are being talked about in the world of sustainability and we hope that you will use it to really build and develop your own plan which is going to be unique for each and everyone of you, so here is a little bit about this two activities I was talking about before we dive in to the eight key factors. The first one is defining sustainability. You will see appear that there are page numbers. I'm happy to hear a lot of pages turning and you are going to see a lot of page numbers on the next slides, so please feel free to slip to your guide and follow along or just, you know, listen. So on Page 9 I think I said that wrong earlier on Page 9 is this, is the activity to help walk you through defining sustainability for your programs. This is a really critical part, if you haven't already done so to take back to your programs, it doesn't have to be a perfect definition and it may be should always be changing, its really a matter of how you see your programs and how you want to end up with your programs in the next couple of years. The next activity on page the activities on 11 but some of the beginning conversation about this is on Page 7 and 8 is really about defining some measures of success. How do you know that you have been successful in determining your sustainability for your program and it's really important to have those ideas before you start this, before you endeavor too deep into sustainability planning and if you haven't started yet just start now and that's fine. On Page 8 we will give you a pretty big list of some examples of matrix of success. Now we are going to dive into the factors. Factor 1 is create and action strategy, this is really sort of an all encompassing factor that really helps you start thinking about that bigger thing of planning for sustainability. What does it mean? Where are you going? What do you need to do? On Page 14 are the keys to success. You have all seen these in the framework and these also flow directly into the critical action steps, so there is keys to success and critical action steps are really the things that build in to creating an action strategy. The picture that's up here is Page 23, it is an example of a sustainability plan. This is just one of

many. OAH did not want to prescribe a specific template for you to follow. This is one that we are suggesting and you can use as a tool. Page 27 I believe has a long list of additional resources, additional tools including some sustainability plan templates that are already filled out so you can get a good look at what one looks like and then some other options of what some empty ones look like. Factor 2 assess the environment, I don't think I probably need to tell you how important it is to understand what kind of environment you are working in. From your own internal organization to the partner organizations you are working with in the communities that you are serving to where you stand in the financial and political landscape. The keys of success were on Page 31 will help you start thinking about assessing those parts of your programs and give you a better sense of where you are? Where your strengths are? And where your weaknesses might be? So that you can also, you know kind of think about those as we are planning for sustainability and thinking about where you are going to go ultimately. Factor 3 is the adaptable, the keys to success are around Page 52. This is really to help you think about meeting the needs of your community as they change. We heard from a couple of grantees over the past several months that your needs are going to change and it's important to think outside of that box, not staying away from your program models, but thinking about how you can incorporate new ideas to add to that and this is a couple of activities that can help you do that and hope you consider that. The other important part of this is really thinking about what research help guides you and lessons learned can help guide you in adding these activities and adding things to do for your programs or modifying them slightly to meet the needs of your communities better. Factor 4 is securing community support. These keys to success are around Page 61. The important part of this factor is about getting that community buy-in, having your community support your program and have your community help you market your program. This is where you are going to find the big key components of that communication piece and communication strategy. I know we have a speaker I think tomorrow was going to talk about that communications piece and for our tools the communication piece lies in factor 4. We are going to talk a little bit more about factor 4 in detail at the end of this to sort of walk you through what each of these factors can do. Factor 5 is integrating programs and services into your local infrastructure, the keys to success are around Page 75. This is really helping you think about streamlining your programs and services. How can you make them more effective and more efficient especially as we are coming towards the end of this particular funding cycle. It also helps you think about how can you embed your programs into other community services. On the webinar, a couple of weeks ago we heard someone ask a question about how can I think about doing that if my program is not school based. I gave an example of perhaps you think about embedding your curriculum into a school system so that the school system itself has absorbed your curriculum, so the brunt of the work is not necessarily on you. It's about helping the school system, integrate the curriculum and train their own staff to deliver the curriculum, but the other example is if you provide mental health services do you have a mental health provider in your community that can help you do that so that some of the services can be put onto some of your

community partners, so you are not changing your services, you are just finding new ways to build partnerships and new ways to integrate that in to the community. Factor 6 is build a leadership team. I know all of you know how important having leaders in this conversation and in your programs is the focus of this factor is to really hone in on having a team of leaders internally and externally. A team of leaders really helps keep that conversation alive, it brings in new ideas and new concepts and ways to think about sustaining your programs. In addition it helps when your staff changes. If you have changes in roles or people leaving and coming in having that leadership team to help keep that knowledge within your program is critical. You don't have to recreate the wheel when someone leaves. You already have that institutional knowledge built in to that team approach. The key successor on Page 84; we also talk a little bit in this factor about integrating your community partners and your other community leaders. Having them play a role in your sustainability planning is critical. They will be people who can help you with the financial aspects of things helping you talk through other ways to deliver your services and other organizations and community partners to work with to really get your program sustained in a way that maybe you haven't thought of or maybe you are trying to do. Use those community partners as integral part of your leadership team. Factor 7 is creating strategic partnerships. The key successor on Page 98 and again this is that building those relationships and continuing to maintain those relationships. Who do you currently have a relationship with and is that relationship a two way street making sure that it is. What are you giving to them and what do they give to you. Continue that communication, continue that relationship building. The relationships kind of can become stagnant if you don't give them a lot of care and love so making sure that you are doing that. I have an activity highlighted here on Page 103 and 107. One of them focuses on the relationships that you already have and the other one focuses on relationships that you could develop. So up here, I have an example of relationships you could potentially develop. I realize that some of you already have health clinic partnerships but let's focus on the PTA and the local grocery store. So the point of the activity is to really get you thinking a little bit outside of the box. This is for new relationships. A little bit outside of the box about what people in your community could help with and how you can leverage their resources and their supports for your program. I highlighted the local grocery store and this is because this is one that potentially isn't, it's not an immediate thought. I kind of set it off the cuff and we decided it was actually a really good idea that perhaps you could look to the local grocery store to provide some snacks for some of your programming and activities. Snacks bring people in everywhere, doesn't matter how old you are? Where you are coming from, people love to come for food. So if you partner with that grocery store he is helping you sort of bring in people to your programs now what can you do for him. You can advocate for his store, you know this came from Bob's Grocery Store down the street he's got great stuff, great food very good price. You are helping it's a two-way street. So that's really the core point of these activities is to really start you thinking about how do you keep and maintain those relationships you already have, but also think about those relationships that you don't have. And I encourage

you to talk with one another and learn from one another what relationships do other people have and how are they cultivating those and making them joint relationships in a two-way street. And the last factor, factor 8 we purposefully left this to factor 8 and there is a couple of reasons. It's not to say this is less important but it's to say that a lot of times when you say what is sustainability mean, people say it means having funding. Well that's true but it also means all of these other activities and all of these other points, so factor 8 save to the last is really to encourage people to flip through the rest of these factors and start thinking more broadly and bigger about sustainability and then focusing in on this financial piece. This particular factor the key successor on Page 117 really helps you to think about using those key partnerships. Thinking outside of the box about what avenues of funding you can look to. We focus on different types of funding, different financing models for your program and making sure that we are looking at including in time resources like Bob's Grocery Store that's financial support. We also encourage you throughout this factor to really focus on the core activities. In this particular factor, you will notice that we talk a lot about referencing factor 2 which is assess the environment. The importance of that is to just understand where you are at and then building on where you are at and where you are going, so we want you to have a good understanding of the core needs of your community and how your programs and services are meeting those core needs. So we are going to take a minute and go through factor 4 in a little bit more depth so around Page 61 these are the keys to success; the critical action steps as I mentioned flowed directly from these keys to success which you are familiar with from the framework. The critical action steps are really about for securing community support, are really about creating that message. Understanding the approach that you need to take what that message is to deliver and who you are delivering it to. And then actually delivering that message promoting your programs, promoting your services and getting your partners and community members to buy-in on that and help you promote that message. This is Page 63 and it again walks you through what is the communication? What does that mean? What is a marketing message? What are the pieces of that that I need to know? This helps you outline contextually what that looks like. Who is your audience? What is that message who is going to deliver it, how is it going to get delivered and why is this important to your communities. This is just one way the guide helps you sort of think about how to build that message for your own programs and here is another way. It's directly linked to these activities. Page 67 this a way for you to walk through each of those things and write it down, I think we heard out from a lot of grantees in the previous couple of days that it's really nice to have an opportunity to just sit and write things down and get things on paper. You probably all have a lot of sustainability planning already taking place. This work shop in this resource guide is to really help you formalize that a little bit and get it done on paper, so that you can take it back to your programs and have a little bit more formalized discussions about it and really get motivated to continue that planning. This is building on from that last activity, so this is to look at who is going to help you deliver that message and diving into, where they are going to deliver that message specifically. Does that message need to be changed at all

for that person to deliver effectively. So, if they just continue to build on one another. There is a couple of points I want to highlight before moving onto the appendices. The resource guide and the factors themselves are meant to be taken however you see fit. You don't have to go factor 1 through factor 8 you can start at factor 4 and you can start at factor 7. There a lot of repetition and that's purposeful because we don't want to require you to go through 170 pages, if you don't feel like you need to. So, the repetition and the references back are really for you to use for more information and so just keep that information flowing in so that you can make it fill out. The final pieces of the resource guide are in the appendices and as I mentioned before that includes the assessment which we will talk about a little bit later in a little bit more depth but starts on Page 135 of the resource guide. The resource list which follows that is a full list of all the resources that we use to help build some of these tools. All of the resources that we use for the frame work are included. All of the resources that we use for the resource guide are included but in addition to that there is a number of resources that were not explicitly included but that we looked at for ideas and for activities and just general guidance in sustainability planning. This was just a way to pull some information together for you as community health advocates to go as a one quick stop for more information. There is a lot of government resources in there. There is a lot of other organizational tool kits and sustainability planning guide, so it's just a long list of a lot of additional resources for you. It's hopefully a little bit more targeted than Google. And if you Google community health and sustainability thousands upon thousands of activities come up. We highlighted some of those that we think are most effective. And then the final piece in the appendices is the grantee sustainability examples and I know that Sabrina mentioned that we had an early grantee work group and that work group was instrumental in all of this work and you know we couldn't have done this without them but in addition they also gave you some examples of what their sustainability planning looked like. These are short narratives of kind of where they are in the process of their sustainability planning or some sort of specific areas of their sustainability planning. We have highlighted in these examples exactly which factors they sort of highlight and target, so you have a little bit more direction onto some of the applicability for some of these factors. So what's next for you all. We have already explored the framework that was the webinar I know you all came in with a lot of information about the framework and the context behind these eight factors. So lucky for you, we are not going to do it again I promise. But the next steps for us over the next day and a half is really to dive into these other activities and really get you moving on using these resources and understanding how to use them and hopefully leverage them as tools for yourself and for your programs when you go back home. So over the course of the day and a half, we all spent sometime with the assessment, you will have an opportunity to take it and then we will talk about what the assessment means and use it to sort of map out your sustainability planning and by that I mean specifically how we are going to use the tools that are in front of you. So what is your assessment responses to map out what's next in the resource guide. Then we will actually spend some time using the resource guide. We have an opportunity to work through some case studies which don't directly address

your programs, so you have a little bit of time to think outside of your own programs for the context of this resource guide. And then tomorrow, we are actually going to spend some time diving into the activities and the resources here for your own planning purposes. Will use your results of the assessment and you will be able to choose some of the factors to focus on, we are going to focus on two of them and really use the resource guide to help you walk through some of the questions that needs to be asked around sustainability planning for each of the factors. And then using those factors will give you some time to really start building that plan. We are not going to come up with the sustainability plan for your programs and you are going to take it back and say “Woo I am done” you are going to plan a couple of items that you can take back with, share with your programs and then build it in bigger depth from there. So that’s the sort of the scope of this workshop and we hope that you will take a lot of this back and a lot of these lessons learned and share amongst yourselves information about sustainability planning and successes people have had in challenges and how those have been overcome back to you programs to really dive into that sustainability planning process.