

Introduction to Sustainability by Sabrina Chapple, OAH and Jen Rackliff, ICF, March 4, 2014

Good afternoon everybody, I am Sabrina Chapple and I am a Fellow Project Officer in the Office of Adolescent Health and it is wonderful to see you here. I promised that we would see each other again. I got the pleasure to meet you guys in August when we had our conference and we talked a little bit about sustainability then and boy he did not know that we were going to be bringing it this much. So hopefully today we have maximized the benefit and actually you know addressed the ask, the ask of us was to, we needed additional resources for sustainability. Can OAH bring that forward? And so by the end of tomorrow we hope that we have met that mark for you and actually there will be more to come. But again, let me just take one moment and I want to say thank you to, the OAH wants to say thank you to a host of grantees here today and some of those are part of our TPP program, tier one and tier two and they are not here today, but I would like to thank the OAH grantee workgroup who put numerous hours into helping us develop the resources that are in your binder today. So if I call your name please just take a moment to stand so that we can give you a proper thank you. Jessica Aufrichtig, Kristen Black, again some of these are from our TPP program, Erica Chavez, if you could please stand if I call your name, Jessica and Kristen if you could please stand, Kim Clark is from our TPP tier two and is not here today, Shannon Flynn, Christine Heyen, and we also have Estelle Raboni who is also a TPP, so these are your two PAF representatives who have put in a lot of hard work and our very thick binder there, let's give them a hand, well, thank you so much. Let me tell you, we met almost twice a month, they reviewed a number of documents provided input with you in mind, with the youth in mind, so I can't, this effort would not have been possible without them, so thank you so much. So what I am going to do just very briefly spend just a few moments and I am going to step down and we are going to get to the meat of today's agenda, is to talk to you a little bit about the OAH process and actually conceptualizing or defining sustainability. And so if we could, so you know much like, how many of you guys have been in strategic planning groups or developed mission and vision, just raise your hand, probably half of this room. So this, what I am about to present today is really nothing new but much like developing an organization's vision and mission there are very distinct steps that OAH took to develop and conceptualize our sustainability definition of statement, but at its course you can see in this, this wonderful diagram here at the core of OAH's concept embodied around it are three very key stakeholder groups. Well stakeholder groups include you, the OAH staff and the OAH leadership. So as you can tell (inaudible) or conceptualize what it means for OAH on a national level was done in a silo and it wasn't developed by a single person. So clearly knowing what was important to our key stakeholders was critical and vital for a very strong and effective and enduring definition and concept of sustainability. So you will probably wonder well how did you go about that? Now I promise you, we started after the PAF conference, we have been in this process for several, several months and I do believe that (inaudible) is going to talk to you a

little bit about a process and her process it looks to take much longer but if you have to have some patience with this. Well we have five critical steps and again as I noted that we really reached out to the group and identified two of your PAF colleagues to help us think this through but first we conducted listening our dialogue session and many of you guys participated in that several months ago. What we really wanted to gather is your ideas, your insights, your experiences on how you define or conceptualize sustainability. And again I am offering you this process not to say that you have not gone through this and perhaps you have and you arrived at your definition but I recall on one of our OAH grantee workgroups that you know it will really be good if OAH shared their internal process on how they arrived at this definitional concept and so that's why I am kind of giving you this overview today. So perhaps you have already defined it, perhaps you want to refine it, so maybe this insight on how we went about doing this would be helpful and again you will hear a lot from your peers today about their own process. But again in open dialogue with OAH grantees we learned a bit about sustainability actually a lot and these meetings were held by facilitators or moderators and it was a very much guided open discussion. Again everything was transparent, people offered their definition, their thoughts, their experiences and we recorded each of our sessions and the transcripts were used for the basis for subsequent planning. In addition to that we sat down and we gathered insights from our OAH staff and our OAH leadership in getting what sustainability meant to them, I mean I would be at a loss if we did not tap into the expertise of our staff, and you know staff contain passable factual information they talk to you on a day-to-day basis and their experiences really were needed to help support our view. So we want to take full advantage of this experience and there was definitely no need to reinvent the wheel. And as I mentioned we reached out to your colleagues and pulled them into the process. Lessons learned, personal lessons learned that when you are asking people questions about what their view is or what their concept is about sustainability, you know, don't be limiting in nature, allow them to give you their most idealistic, most hopeful and most positive ideas, allow those to shine through. And again don't worry about necessarily what was practical, we knew that we would probably have to go back and refine and redefine what it meant for us overtime. So again allow for those healthy conflicting views to organically emerge, that's just one lesson learned just being a part of the process. At the same time we worked very closely with ICF and Jennifer's team to look at the literature and look at existing HHS sustainability frameworks and definitions and then from there we really got a nice broad view of kind of what was already done that was out there. The key here was to try to leverage existing resources, again no need to reinvent the wheel. So with all this information and various data points it was just about time for us to bring our definition and concept into focus. Questions, we had to ponder, you know, do we need to have one definition for TPP grantees, do we need to have one for our PAF grantees or can we have one just for all of OAH grantees and these are things that we definitely have to contend with. Our decision was that we were going to actually develop one concept and definition that captured all of our ideas and insights from our 360 assessment with our key stakeholders and then obviously with a few refinements we

sharpened our definition and we presented that to you during our webinar. So I am going to also just show you very quickly on the next slide before I do that, we wanted to make sure this process was open, inclusive, and transparent so many times we had to go back to our stakeholders over and over again to make sure that what we are putting forth resonated with them. So initially what I am presenting to you is our first concept which you can, it looks quite wonderful but on the flipside that we realized that this specific definition we thought was pretty narrow and it became very evident that we needed to broaden the definition. Again, that it was enduring for the long-term and that it aligns with OAH's mission and vision and key priorities. The key priorities of which, you know, wanting to improve the health and well being of adolescence, and able them to become healthy productive adults. What we ended up with is the second definition which is presented to you on our webinar and also in your binders was widen enough in scope but allow for a sense of continuity with OAH strategic priorities and vision also most importantly that it would be built to last and will guide OAH's future and current efforts. Again keeping our eyes on the positive long-term health outcomes we wanted to go beyond just the implementation or continuation of a single program, we know there is a lot of things that you all do strategically, strategic activities, but again we wanted to ensure that our definition was for the long-term and can endure both the present and the future. Again transparency is, was critical because you will get a lot of questions, a lot of scrutiny and so we wanted to make sure that we did that continuously through out the process. And this is a very quick overview of kind of what the process look like and I am happy to talk to you individually more about you know the time, the effort and other key critical steps along the way. But hopefully I hope that this portion, very brief with this presentation allows you to continue to feel more confident either continue to work on defining what your definition is or concept is or perhaps you feel very firm that you've landed on something that is long-term and it's enduring and it's aligned with perhaps your organization mission and vision. So before we move forward to the bulk of today's presentation, what I wanted to really emphasize here is that, you know, our work on sustainability began at 2011, we developed a number of wrap around resources for you. We hope that you are taking full advantage of the resource, online resource centers both that of PAF and TPP, there is a number of resources there that can help you with your work when you get back home. And today we are going to briefly talk a little bit about the framework, the guide and the assessment tool. Once you get back home, it doesn't end there, we do plan to move the actual guide to an online format into an online toolkit and as well as your project officer, of course will continue to work with you in the development of your sustainability plans. So without further (inaudible) I am going to go ahead and hand the mike over to Jennifer Rackliff, from ICF and she is going to talk to you a little bit more about extents of resources.

Jennifer Rackliff: We are going to go through this extremely fast, so please just keep in mind that as we move forward in the next, the rest of today and until tomorrow, you will be utilizing the resource guide and you will have an opportunity to practice using it in a couple of hours. So

we are going to go through this relatively fast, as we move forward there's a lot of notes on where you can find pages in the resource guide so you can follow along as quickly as you can. As Sabrina mentioned, this, what we are focusing on right now is this suite of, the collection of resources specifically called "building sustainable programs" that include the framework, the assessment and resource guide. The framework, I am not going to touch on in detail, I believe most of you heard the webinar and have accessed the framework so you've had a chance to look at the research and literature sort of context behind the eight factors of sustainability that OAH is presenting to you. The assessment will be something we'll talk about in a little bit more detail during our session on the assessment but it's really about helping you gauge where you are at in your sustainability planning processes. The resource guide is the nuts and bolts of sustainability planning, that's chapter four in your workbook or your packet today and it has a ton of information on worksheets and how to think about planning for your unsustainability but that's what we are going to be talking about now. As I mentioned, the assessment is kind of built around those eight factors of sustainability, there is questions around each of them to help you sort of plan for your sustainability planning process and what areas you might need to have a little bit more assistance on and what areas you really shine at, that will be helpful in sort of building those peer-to-peer networks and maybe sharing some of your lessons learned with those who you can learn from. The assessment is meant to be taken after you've had a chance to review the framework, so you have a little bit more context behind the sustainability factors, the eight sustainability factors and then before you do, before you use the resource guide, it's sort of really a math to help you use the resource guide. And then we also encourage that you consider assessing yourself on a regular basis, do this as soon as you get home, you will start doing it today but as soon as you get home and then at least yearly if not more than that on how you see it fits your program. As I mentioned this is the nuts and bolts of your sustainability planning. It has an overview of the eight factors, learning objectives, and talks about why it's important and then your critical action steps, what does it really mean to hit on each of these eight factors and then activities and worksheets to help you walk through and work through some of these ideas. The activities, every single factor has some activities, there are additional activities at the beginning to help you walk through defining your concept of sustainability that Sabrina just mentioned as well as walking through some ideas on how to build metrics of success in determining your sustainability. The worksheets are meant to be worked through sort of in tandem with the resource guide, you can read through all 170 pages and then do the worksheets or you can focus on it by factor. So as you go through factor one complete the worksheets for factor one. You will notice that the resource guide sort of build upon itself in some areas but also repeat some information and that's because we don't intend for the resource guide to be taken all at once in one whole, you have to go through factor one to get to factor eight. Its meant for you to use as you see fit, so you might need to focus on factor four, which is securing community support, maybe that's where your highest need is, so go to that section, focus on it and we will be working through with you all today to sort of get to that, to get to that point. As I

mentioned and as I am sort of getting at it is that the resource guide is meant to be adapted to you and to your needs, so please take what is in there and make it fit your needs and fit how you are thinking about sustainability. It's not meant to be prescriptive, it's just meant to be a tool for you to use. So that's a really key point about the resource guide and all of these materials. So these are the two activities that Sabrina started talking about a little bit ago on defining sustainability and measuring your success. These activities as you can see are around page nine for defining sustainability, actually that's an activity and then on page eight for around for measuring success. The defining sustainability is really to just help you walk through with your program and with the staff members and community members of your team to really think about what sustainability means for you. And I mentioned the success metrics are, you know, its important to have goals in mind that you are striving for and this is, this will just help you sort of outline what that looks like for you. Now we can jump right into the factors, factor one is, create an action strategy. This falls around page 14 of your resource guide if you want to follow along with me but this factor is really meant to sort of be the house of all of the factors, it really gets you thinking about sustainability and kind of starts you in that planning process. What it does include is a sustainability plan template you can choose to use the one that's provided or any of the other options that, there is a list of other additional options and resources as well. You can choose whatever works best for you but we do have, the picture of it is up there, we do have that available for you to use. We encourage you to look at this and sort of start thinking about your sustainability planning and perhaps look at this before you continue on for the rest of the factors, but as you are building that sustainability plan, that picture that's right up there on the template, use that template as you work through these other activities, kind of have it side by side so you know what you are ultimately getting to. In this, this factor is sort of that, building that ultimate plan which the other factors will help you walk through. Factor two is assessing the environment. It's really built around the importance of understanding where you are working in and what the environment that you working in and with the community that you are working in. We recommend that you at the very minimum sort of do an assessment of your organizational capacity, look at your community needs, the financial and political environment, so that you understand sort of from a full scope of things where you are in your sustainability planning, what your community needs are and how can you best meet them and what opportunities there are in the financial arena and the political arena for you to really build up those programs and services. It's an opportunity for you to sort of easily gauge or at least get into a place where you better understand where your strength lie and where your weakness may lie, so kind of helps at the stage for your sustainability planning and your overall understanding of where you lie. Factor three, is be adaptable. This around page 52 and your key to success which I guess I should mention, for those of you that know the framework, the key to success directly translates to the critical action steps, so those two are one and the same. They kind of, they walk you through each of these steps and you will see those probably for factor three around page 52 or 53. So being adaptable is really about making your program meet the needs of your community and

how can you best do that. I know that, we are bringing you here today so that you can talk with one another and learn from one another, use what you learn from one another and what's been successful and what's been challenging and how people have overcome those challenges, so take back to your own communities. And you know we don't want you to step outside of the arena, the programs that you are serving but think about being encompassing of other opportunities and other lessons learned. This also incorporates some of that innovation, so continue and always remember to look at the research and what's going on out there in other areas, other program serving similar populations and talking about expectant and parenting teens and how to meet their needs. So make sure you are always thinking about that innovation piece and bringing in ideas that really help you better meet your community needs. Factor four is securing community support. Again this is the talking, this is talking about identifying your community champions, building those community relationships so that you can help them or so they can help you market your programs and services. This is also a factor that really helps you hone in on the communication piece, what are the messages that you need to share that are important for your own program and your own services, how do you get those messages across, who is the audience for those messages. And as you work with your community partners how does that message change for the community partners you are working with, it shouldn't change your message but your message may need to be delivered in a different way. So this factor really sort of helps you think about those dynamics. Factor five is integrate programs and services and to local infrastructures, that's about looking how you can embed your programs and services into community organizations and activities that are already happening and probably a lot of you are already doing this. So it's really sort of just honing in on that and building upon it. The activity shown is on page 79 so this around page 75. It's really, this is really about, I will use a couple of examples, one of the example I believe I used on the webinar was about looking at, if you are building a school curriculum, having the school take on your curriculum, so it's not you providing the training on the curriculum and delivering the curriculum itself so that it's the school that starts buying in that. Another way that this may play out is, if you provide mental health services maybe you should start thinking about working with a community organization that provides similar services, building them into your network and how can you leverage their professional skills and their capabilities in providing that service for your own program participant. Factor six, again around page 84, but build a leadership team, I don't think that's probably needs much explanation, I think many of you in the room are the leaders of your team and that's a very important component when thinking about sustainability, building that leadership team. To focus on this is not to have a single individual being your leader but a team of people both internally with your program and externally with the community and the partners you work with. Part of that helps to you know keep that conversation and that shared vision going among all of you and so that people are constantly talking about it and building on it and thinking about how it really plays into the activities and programs that you are providing. Another part of that is to really be able to make sure that if you have staff turnover and when you have staff turnover that

team can keep your sustainability planning going, you don't lose institutional knowledge with staff turnover. So the activities in this section really kind of help you hone in on who that leadership team could be for your program and organization and who from the community could serve in that capacity to help you. Factor seven is create strategic partnership, again this is around page 98 and it's about building those networks outside of your program. Talking and looking about at how, what services and opportunities you can provide to partners but also how your partners can provide things for you, so building that two way networks. You will see the example up here, and this is from page 103 and 107. One way, think outside of the box for your network, so this is what this activity is trying to do and what's really important about this particular factor. We have local grocery store as an option, as an example here. What can, do you currently partner with a grocery store if not maybe you can, they can provide food for some of your community meetings and trainings and learning opportunities for your expectant and parenting teens. So what can you do for the grocery store, you can market his store, just have a little sign up there that says, this food is provided by the grocery store down the street. So think about how you can build those, even non-traditional relationships. The other opportunity here is to really think about what you, what your partners can help you with in terms of building your staff capacities, peer-to-peer learning opportunities and possible joint financial opportunities. So really think broadly and in very large scale about your partner relationships and what they can bring to you and you can bring to them. And then our last factor, factor eight, Secure Diverse Financial Opportunities. We purposefully left this at the end because when someone asks you what does sustainability mean, a lot of people say, well, it's about having funding to do it and it is but it's about all of these other factors as well. So we want this to remain a very core part of it, but a core part of it that helps you, that allows you think about some of the other pieces first, that's not to say that you can't dive directly into this factor, please know that you can if this is where you feel like you need to focus on. So this is around page 117 and it really, what we really hope to do is help you think about the process of planning for financial stability. So it's about looking at those partnerships, how can you leverage those partnerships into financial opportunities, how can you, where can you look for diverse financial opportunities. One of the unique things about this section is that it includes actually a list of opportunities of non-traditional funding opportunities and where you can look to other funding opportunities. Some of that list we got from our sustainability work group from some of your peers and some of the list we got from OAH leadership. So it's you know think expansively about your, where your financing is coming from and how you are financing your services, that's really about what this factor focuses on. So we are going to take, I know what they were running really over but I did want to take an opportunity to focus in on one specific factor so you can really think about how the resource guide functions for you. So we are going take a look at factor four, secure community support. Again this is around page 61 and then we are going to go through a couple of the activities of them. So you can see what may actually play out for you. The critical actions that are listed here, again these are you keys to success from the framework if you are familiar

with that piece, but the critical action steps, I am not going to read them verbatim but it's about that communication message, promoting your services and then using your partners to help you share that message. Here is some language from the text, this is really to help you think about what does that message look like, what do I need to think about when I am thinking about sharing information about my program. So in the text you can find, this is on page 63, well you might want to think about the purpose of all of this, your audience, who are you going to target, your message, what is the contents of your message, who is delivering it and how is that relevant to your communities. I mean I am highlighting this particular piece because it's here in the text of the document but it's also in the activities. So the text of the document is really get you thinking about these things, the activities are really to make you write it down on paper. So there is activities on page 67 and as you can see it follows pretty directly and linearly with the text on page 63. So it asks you the similar questions but it gives you an opportunity to write it down. And then this kind of takes even a step further. So when you are thinking about your community partners and sharing that message and how they might share it for you, this is really the step for doing that, who are those people that can share your message, how does that message change for each of those audiences. Actually there is one more thing I want to say about this, at the end of every single factor there is a wrap up and I don't have a picture of it and probably on this one it's around page 71 to 73 maybe, but it's about giving you an opportunity to think about what the challenges that you had, getting through the activities, answering some of these questions, that way it gives you some opportunity to think about where you can get some more help, you can get that help from your project officers, from your peers, from your community partner. So think about, you know, areas that you might need further support and know that that support is there. The other part of that wrapping up is the planning your next steps, it's really just an opportunity for you to sit down, you've already completed the activities and write down what's next, what do I need to do next, do I need to reach out to Bob at the grocery store to start that process, do I need to reach out to Sabrina and my project officer to really get some more information or to learn some more about how I can build up my, build community support. Maybe it's reaching out to one of your grantee peers and talking with them, so that's really those next steps. Those next steps can feed very directly into your sustainability plan template or you can use your sustainability plan template to sort of plan sustainability more broadly. So there is a lot of flexibility in this tool and we want you to use it as flexibly as you need it. So I believe the last couple of things that I will talk about is, the assessment, again it's in your resource guide and for today's meeting it's actually in two places, it's in the resource guide in appendix A, but it's also in I believe tab 5, so that you can use that as we, or later in the meeting. The two other important pieces in the resource guide is the resource list that's appendix B. This list includes all of the resources we used for the framework, all of the resources that we used for the resource guide and everything in between. It has a ton of lists for HHS specific sustainability tools, other organizational sustainability tools, great literature, I mean it's a five or six-page list of all resources on sustainability, a quick reference list for you. I would also say largely these

resources pretty directly relate I think to some of the work you are doing so you will find that that as sort of easy reference tool. The last thing in the appendix C is the grantee sustainability examples. We heard from a lot of the grantees that they really want to see what are other programs doing in planning for sustainability, so this is the first step at that. These are sort of short narrative stories about, from seven grantees on their planning for sustainability, this was the OAH work group, the grantee workgroup that really provided these samples, so we appreciate their additional work on this. And in each of the samples you can see which factor, the example sort of follows and get some better idea of how each of these factors may function for you own program. So the final thing I have to say is, what's next. We've already done the exploring of framework, that was the webinar, that was you taking the opportunity to look at the background behind these eight factors, the context behind them, the research behind them. And so the rest of this is sort of where we are going from here on, the next step we are going to do is taking the assessment and we will do that this afternoon and you will use that assessment to sort of map out what your sustainability planning looks like. If you find that in factor four securing communities before you need some extra additional support, maybe that's where you first focus is, then you focus on financial diversity piece. So you will sort of map out where you are going to go and how you are going to use the resource guide, then you are actually going to tap into the resource guide for some of these tools and opportunities, again use each other, bounce ideas off of each other especially while you are here, tap in to your project officers for additional support but the resource guide is really that first step in first conversation for this, for your sustainability planning and then your final step is really developing that sustainability plan. And we will get into some of this a little bit more minorly tomorrow where you will have an opportunity to actually really build a sustainability plan and probably just one or two pieces of it but it will at least get you started and start thinking about to take home to your own team. So with that, I know now you all should feel like experts, no, I am just kidding, there are going to be lots of opportunities for you to learn how to use these tools and opportunities for you to ask all of the staff that's here, myself included. We will be doing as I mentioned at the very beginning case studies to walk through some of these with some examples that are not your programs directly and then we'll dive into it for your own planning purposes tomorrow. So with that I will turn it back over to Sabrina. Thank you.

Sabrina: So let's just take a moment, do people need to do like a quick three-minute stretch? Okay, I see some heads were like this, okay, let's take a three-minute stretch please come back...