

## Consulting and Technical Assistance: SUSTAINABILITY PLANNING

Sustainability planning is a complex and challenging process that helps state and community leaders:

- Benchmark their progress and identify strengths and weaknesses of their initiative;
- Clarify their vision;
- Create a strategic financing plan that includes cost studies, fiscal mapping, and the design and implementation of financing strategies to support their goals;
- Build organizational capacity and community support; and
- Develop a clear, written sustainability plan.

### How can sustainability planning help?

Sustainability is a critical issue for the array of programs and initiatives that promote healthy children, strong families, and safe communities. Time-limited grants, narrow categorical funding streams, and difficult economic conditions leave program developers in a continual struggle to find a stable base of resources so they can maintain their work over time. The Finance Project offers tools, training, and technical assistance to support sustainability planning.

### Services offered by The Finance Project

Utilizing the tools and worksheets included in our [Sustainability Planning Workbook](#), The Finance Project provides intensive, customized, one-on-one technical assistance to help state and community leaders effectively develop sustainability plans that address issues and challenges specific to their needs. Technical assistance is focused on helping initiative leaders complete a comprehensive planning process.

- Assist states and communities determine their **readiness** to engage in a sustainability planning process by assessing organizational capacities and resources.
- Help initiative leaders identify the range of **stakeholders** who need to be engaged in the process.
- Adapt technical assistance **tools** and methods based on the unique needs of initiative leaders.
- Develop meeting **materials** (e.g., agenda, logic models, cost estimates).
- Facilitate on-site **meetings** and planning processes that bring together initiative leaders and stakeholders.
- Identify federal, state and local **funding sources** and innovative financing strategies and approaches.
- Design and prioritize other sustainability strategies related to **organizational capacity** and community support.

- Provide guidance on the development of a clearly written and compelling **sustainability plan**.

The Finance Project also offers training on sustainability planning through the [Sustainability Training Institute](#).

### Examples of Our Work

The Finance Project has provided sustainability planning technical assistance to a wide array of communities and organizations working on early childhood education, out-of-school time, child welfare, community development and youth development initiatives. Recent examples of our work include:

- **Annie E. Casey Foundation Making Connections Initiative.** The Finance Project supported an intensive four-month planning process with a youth development initiative in Hartford, CT. The planning process focused on developing an investment strategy – including the creation of a new public-private investment pool – and creating a coordinated approach to youth development through the implementation of a unified data and case management system among the many youth-serving agencies in Hartford. Based on the strategies outlined in their sustainability plan, initiative leaders succeeded in forging a shared vision among key players in the city and have obtained \$2.5 million to support this approach and to supplement the declining Department of Labor Youth Opportunity grant dollars.
- **Charles Stewart Mott Foundation Statewide Afterschool Networks.** The Finance Project is providing consultation and technical assistance in the planning, study design, and data collection phases of fiscal mapping studies for statewide afterschool networks, using customized tools specifically designed for statewide coalitions.
- **James Irvine Foundation Communities Organizing Resources to Advance Learning (CORAL) sites.** The Finance Project provided technical assistance to five sites developing sustainability plans. The focus of the sustainability plans centered on creating a shared vision for CORAL among key stakeholders, building community support for afterschool programs and services, and developing comprehensive public and private financing strategies for afterschool programs over the long term.
- **Jim Casey Youth Opportunities Initiative.** The Finance Project facilitated intensive sustainability planning processes in nine states seeking to provide a range of supports and services for youth transitioning out of the foster care system. As a result, state and community leaders identified and engaged new partners, secured new funding sources, and designed new governance structures. Additionally, leaders used the process to improve policy and practice within partner organizations and public agencies. The Finance Project is also facilitating a sustainability planning process with the national initiative.

## **Outcomes of Sustainability Planning Technical Assistance**

The Finance Project conducts regular evaluations of its technical assistance activities. Recipients of technical assistance on sustainability rated the **quality** of the services provided by The Finance Project very highly, noting that:

- Staff are accessible and easy to reach;
- Staff are knowledgeable;
- Staff respond to requests in timely ways;
- Technical assistance they received was tailored to their unique needs; and
- On-site visits were productive and well-facilitated.

Recipients also reported important **outcomes** that occurred as a result of customized technical assistance.

- Recipients reported that as a result of technical assistance from The Finance Project, they changed the way they thought about sustainability.
- Recipients successfully identified strategic issues related to sustainability, including financing, partnerships, governance, communications, and results, and developed strategies to address those issues.
- Recipients sought and obtained new funding sources, including new state funds.
- Importantly, recipients reported that, as a result of technical assistance received, they increased local capacity to sustain their initiative.

**For more information contact The Finance Project at 202-628-4200 or [services@financeproject.org](mailto:services@financeproject.org).**