

\*Please note that the Compassion Capital Fund (CCF) program is through the Office of Community Services and is separate from the Healthy Marriage Program in the Office of Family Services. These documents are to be used as references only and not as guidance from OFA. Contact your program specialist if you have further questions related to sustainability issues and compliance with Federal and OFA laws and regulations.



# Laying the Groundwork for Your Sustainability Plan

Tips from Springfield Urban League

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The NRC spoke with Dorene Wright from the Springfield Urban League (SUL, or “the League”), a 2006 CEY grantee, to understand how her organization will proceed with its sustainability plan. Ms. Wright emphasized the importance of a holistic approach to sustainability. It is easy to focus entirely on the financial aspects of sustainability, she said, but doing so will create blind-spots, and you may miss non-financial solutions that will sustain the important work of your organization.

Based on this discussion, the NRC put together a set of questions to help your organization think through various aspects of sustainability before sitting down to develop a plan.

## Step One: Getting Started

SUL began its sustainability planning process by gathering key people within the organization to answer the following questions:

- What is the main purpose of your organization?
- What are you trying to accomplish by maintaining the programs or services involved?
- How do you see yourselves, your role, and your relationship to the community you serve?
- How does the community see you? What aspect(s) of your work do they most value? In what ways do people contribute to your existence, and what motivates them?
- Is your project being accomplished through a partnership? If so, what does the partnership value? What would the partnership like to renew and recommit to at this juncture?
- What are your top concerns regarding sustainability?

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- What threats are the organization facing and what services and programs are at risk?
- What future are we committed to living into? What do we need to face in order to create this future?
- What resources do we need in order to create this future? [How many people, what kind of people (level of education/paid vs. volunteers/type of skills)? What alternatives are there to our ideal set of resources?]

SUL also conducted a SWOT analysis to get a clear picture of the organization's strengths, weaknesses, opportunities, and threats. SUL recommends that organizations evaluate today's concerns regarding sustainability; then "face the future" by exploring what the program/initiative might look like.

## Step Two: Making Sure the House Is in Order

Sustainability planning will require letting more people into your operations. As you work to build stakeholder commitment to the existence of your programs and services, it is imperative that your organization can tolerate a high level of transparency and that you are fully able to articulate what you do and why it is important. Consider the following "check-up" to ensure your organization will thrive during the sustainability planning process:

- ***Are your resources well managed?*** Would anyone have reason to question financial or staffing decisions? Can you account for all your resources in a clear and transparent manner?
- ***Does anything appear to be unethical or questionable?*** Is there legal and ethical integrity, transparency, and accountability throughout the organization/partnership?
- ***Are you proud of your current projects and services?*** Are your courses up-to-date to include new and emerging practices and topics? (A good indicator: do you have anything in your curriculum about the hot topic of sustainability?) Is your organization "ahead of the curve"?
- ***Are you a leader or follower when it comes to technology?*** Is your organization well-versed in the importance of technology-enhanced internet learning tools such as online tutorials, live chat and discussion boards, podcasts,

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and lectures to reach a broader audience? Are you ahead of the times, or are you out-of-date?

- ***Is your work in line with your mission statement?*** Is your mission statement still relevant? You have to know who you are before you can convince others about the need for your existence.

### Step Three: Involve the Community in Your Sustainability Planning

Another key aspect of SUL's approach to developing its sustainability plan is to involve community members every step of the way. The key is to have stakeholders develop a sense of ownership—not only of the organization's mission (hopefully key stakeholders are already on-board with the mission), but of the sustainability plan itself. Here are some tips:

- ***Present clear sustainability objectives.*** SUL recommends presenting a clear set of sustainability objectives about what initiatives are a top priority to keep in place for the long-term. For example: "One: to train the community youth in computing and media skills, and Two: to provide access to information content and knowledge resources."
- ***Leverage existing social sustainability assets.*** Committed volunteers, partners, and other community participants are as valuable as funds. Find out what motivated these people to contribute to your organization, and get a clear sense of which sustainability objectives are most important to them. Finally, ask what they are willing to do to ensure that these key projects remain intact. Being mindful to include existing "social assets" in the sustainability planning process will ensure that your organization deepens its inroads into the community.
- ***Engage community members in critical thinking about what it takes to foster a commitment to economic, social, and environmental community sustainability.*** Having discussions about the future of the community itself is the most appropriate grounding for discussions about the future of your organization. Be the ones facilitating these discussions in your community to reinforce your role within the community.

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## Step Four: Marketing Health Check

Part of your sustainability plan will be to come up with effective marketing strategies to ensure that the right people know the right information about your organization, project, or partnership.

- ***What “capabilities” are you currently marketing or might you be able to market to diversify revenue sources?*** For example, Springfield Urban League markets its *classroom training curricula* along with its *online learning development capabilities* to federal, state, and local entities in order to diversify its funding sources.
- ***What distribution channels are currently in place to get information out about your organization?***
  - The League developed a distribution list (community resource directory) of contacts; this list will continue to grow and will help build relationships with other community organizations.
  - The League seeks out “you scratch my back I’ll scratch yours” relationships for getting the word out. For example, the League has asked for assistance from another organization to advertise some training opportunities on its Web site and has offered to advertise one of that organization’s services on the League’s Web site.
  - The League partners with local universities to get the word out about opportunities; they have a broad and diverse audience.
  - The League uses press releases and other media outlets to advertise and to facilitate extensive outreach.
- ***When and how has your organization taken a leadership role in your community?*** Facing challenges as an alliance and working with partners to address local needs builds credibility, trust, and respect. Your organization’s reputation in this area is essential for unlocking new sources of support.
- ***Who are the stakeholders in your community, and how well do they know you?*** If your organization is a real voice and ally for people and organizations, particularly marginalized ones in your community, this will help ensure that your organization’s services will be sustained.
- ***Do your Web site and print materials display current projects, calendars, and activities? Is the Web site fresh every time someone visits?*** Staying

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fresh and vibrant is an important sign to key stakeholders when they are keeping tabs on your organization. Ensure that the “face” of your organization does a good job of conveying that your organization is proactive, current, vibrant, accurate, and on-target.

## Step Five: Fundraising & Development Health Check

As you know, money isn't the be-all and end-all, but it is a core goal of your sustainability planning. Gather the appropriate people to answer the following questions:

- ***Are you aggressively researching all grant and funding opportunities?***  
What goals have you set and have they worked well for your organization? What systems are in place to track opportunities? Are you using invested volunteers, partners, and stakeholders to keep tabs on opportunities?

- ***Have you considered fee-for-service?***

SUL began to migrate some of its traditionally free services to fee services and thought carefully about how to do this and maintain buy-in and support. Some tips they offer include:

- Think about “lump sum” versus “per head” fees as you get started. For example, require that organizations cover their own travel costs. This approach allows for organizations to feel less of the crunch or helps them accept the change of free/fee.
- Begin with a break-even approach. Gradually increase fees as reputation and credibility grows.
- Word of mouth is great advertisement. Ask partners to distribute information via their contact lists.

**Please remember all trainings, technical assistance, and other CCF-funded activities must remain free and open to all CCF program participants as specified in the program announcement.** Contact your program specialist if you have further questions related to fee-for-service activities and compliance with Federal and CCF laws and regulations.

- ***Have you identified core, fundable projects and services that are clearly linked to a need in your community?***
- ***Have you considered how to engage partners, stakeholders, and target “clients” in the fundraising aspect of your work?***

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- ***Have you tapped out the core types of funding that you have typically targeted? How is this working? If you were going to adjust your strategy, what impact would that have on the current way you do your work?***
- ***Have you and your partners/allies considered applying jointly for funds?***

## Step Six: Outlining Your Sustainability Plan

Having gone through the questions above with the appropriate people, you should be well positioned to outline your organization's sustainability plan.

The League's goals in creating its sustainability plan are the following:

- To produce a document that allows anyone reading it to get a complete picture of the organization, including:
  - Its purpose and goals,
  - Its functions and services,
  - Its organizational structure,
  - Who is involved and what they do, and
  - Strategies for surviving and growing.