BEYOND SUSTAINABILITY TO RESILIENCE

For Community Action Agencies and Other Community Based Organizations

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Sustainability Assessment Tool

Developed for the Community Action Partnership by
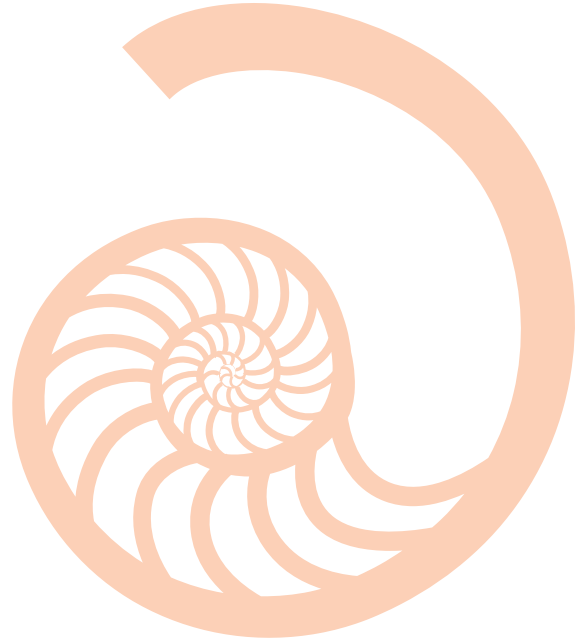
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INTRODUCTION

Sustainability. The capacity to endure. The Community Action network has sustained for nearly 50 years. Yet sustainability requires thoughtful planning as funding becomes less predictable with large periodic infusions and dramatic cuts. As organizations that people and communities depend on, Community Action Agencies have an obligation to consistently serve their communities. As community builders, they must find ways to follow through on commitments to partners. As major employers, they also must build and sustain a team to deliver this work.

Sustainability and resilience involves thinking broadly about what the organization wants to sustain, what individual programs need to be sustained, and then designing a path to do so. Resilience requires the capacity to be flexible and change as community needs and funding environments change.

This Sustainability Assessment Tool looks at five key elements of sustainability:

1. Vision and Mission
2. Results Orientation
3. Strategy
4. Strategic Resource Development
   a. Financial Resource Development
   b. Human Resource Development
   c. Community Resource Development
      1c. Broad Based Community Support
      2c. Committed Champions
      3c. Collaborative Partners
   d. Systemic Resources
5. Resilience
6. Sustainability Plan

Most of the questions here can easily apply to either a specific program or an entire enterprise or organization. However, a program alone cannot be sustainable or resilient without the organization also being sustainable and resilient. So, as you move deeper into the process, some questions are specific to the organization.

VISION AND MISSION
THE PROGRAM'S LEADERS KNOW WHERE THEY ARE HEADED

Organization and Program Leaders need both a clear vision and mission to be strategic. Vision is the ideal state the organization and community is striving for In the long term. Mission is the specific role of the organization in achieving that vision.

The vision is important for several reasons. A clear vision provides the organization a standard for decision-making. It provides partners a clear picture of a shared future. And that picture is also a motivating force for the tenacity it takes to achieve it.

Leaders need to create a process for developing their vision. Ideally, that process will involve key stakeholders such as those the program serves, staff, community partners, and/or board members. It will also involve a review of community needs, program outcome data, and program business process review.

Most visions however extend beyond the specific work of the organization or program. Therefore, leaders of a specific organization or program must determine their role in achieving the vision through the filter of a clear mission that expresses the core functions of the organization or program.

Ideally, programs are designed to achieve the organizations mission. Most often programs are designed in response to a specific Request for Proposal under a short time frame or by funders with particular requirements or expectations. Sustainability planning creates the opportunity to think through strategies for achieving the mission in advance of a particular funding stream and in the context of human and other resources.

For sustainability, a clear mission includes:

- Outcomes to be sustained or improved
- Strategies to be sustained
- Resources needed for the strategies to be sustained

Once there is clarity about what is to be sustained, an effective strategy for communicating the vision and mission that clearly and compellingly articulates how the organization or program uniquely meets community needs or fills a gap in the community. The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. The organization or program leaders have partnered with the community to develop a clear vision of what they want to achieve

B. The organization or program leaders can articulate a clear vision of the desired future of the community.

Additionally, the Assessment considers the organization mission through progress rankings on the following statements:

A. The organization or program has a clearly articulated mission.

B. The organization or program leaders have developed a process to determine what is to be sustained and by whom.

C. The organization or program leaders have decided what they want to sustain (for example, an organization, features of a program, a process, a service, a particular practice, a method of operation).

D. The organization or program leaders have analyzed and can articulate how the program fits (or how they would like it to fit) within the larger community.

E. The organization or program leaders have analyzed and can articulate how the program complements, yet is distinguishable from, other programs.

RESULTS ORIENTATION

THE PROGRAM INCORPORATES PROCESSES TO ESTABLISH, TRACK, AND UTILIZE OUTCOME MEASURES. THE ORGANIZATION AND PROGRAM LEADERS USE THAT INFORMATION TO IMPROVE WORK OVER TIME.

Once there is a clear vision and mission, it is equally important to be able to measure, evaluate, and communicate the results of the program now and in the future. Beginning with a clear logic model, it is important to design the program with a focus on the intended results for low-income families and communities. Connecting to one of the six national Results Oriented Management and Accountability (ROMA) goals is a start.

Having a clear process for gathering and examining outcome data is crucial for sustainability. In the end, no outcome can mean no income. This focus on results creates a frame for developing, implementing, evaluating, and strengthening program strategies. While we often think of data as something to be reported to meet a funder compliance requirement, the sustainability process gives you a chance to think about what you really want to know and how you can use the data for improving outcomes for the individuals, families, and communities the program serves.

Outcome data are important in day-to-day planning and annual budget development. Understanding what strategies are producing outcomes can help the program use existing resources efficiently. The data can help decision makers decide how to invest in strategies that work, strengthen those that show promise, and consider restructuring or jettisoning those that don't.

Last, outcome data also makes it easier to clearly communicate the program's importance both inside the organization and in the community. This can be helpful not only in sustaining the program but also in contributing to community leaders' understanding of the community needs and possibilities.

The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. The organization or program has an accepted logic model that shows how the work fits into a range of efforts to improve the lives of low-income families and communities and connects it to one of the six national Results-Oriented Management and Accountability (ROMA) Goals.

B. The organization or program leaders identify and use performance measures to track the progress of their work.

C. The organization or program uses performance measures to plan work and budget resources.

D. The organization or program leaders examine data on these measures to identify means to improve service design and delivery.

E. The organization or program leaders implement these ideas, including changing or discontinuing programs or services as necessary.

F. The organization or program staff and board collaborate with other programs on improvements to community-wide indicators.

STRATEGY

THE ORGANIZATION OR PROGRAM LEADERS HAVE IDENTIFIED CONCRETE AND ACTIONABLE PROGRAM AND ADVOCACY STRATEGIES TO ADDRESS THE MISSION DRIVEN RESULTS IT SEEKS TO ACHIEVE

Once the results to be achieved are clear, the organization or program leaders can identify strategies for achieving those results. Often these strategies will focus on programs and services but it is also important to consider strategies that center on advocating for better policies, program flexibility and or funding opportunities.

The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. The organization or program leaders have identified strategies that bridge programs to effectively achieve results for low-income families and communities.

B. The organization or program leaders have identified advocacy strategies to address both those results they will directly address and those mission driven results that may be outside the programmatic strategies.

C. The organization or program leaders have determined who is responsible for leading the strategy.

D. The organization or program leaders have identified and developed partnerships between programs or other agencies to effectively implement the strategies.

E. The organization or program leaders adapt and strengthen these strategies based on results and progress data.

F. The organization or program leaders regularly assess strengths and weaknesses related to strategies and adapt them as needed.

G. The organization or program leaders identify opportunities and challenges that impact the achievement of results and adapt strategies as needed.

STRATEGIC RESOURCE DEVELOPMENT

In thinking about resource development for sustainability, there are a variety of resources that should be considered. The most obvious is financial resources but even with adequate funds; programs can suffer due to inadequate human, community resources and/or systemic resources. In this section, we review each of these areas from the perspective of program sustainability.

FINANCIAL RESOURCE DEVELOPMENT

The organization or program leaders have identified a variety of financing strategies that could support the program. The program has a plan to pursue those strategies and is following that plan.

To develop strategic financing, the organization must know the cost of what it wants to sustain. In the case of program sustainability, as opposed to initial program implementation, there may be a variance in costs. When seeking sustainability financing, the costs may differ from the existing program budget. For example, there will be differences between start-up costs as opposed to maintain a program such as costs for creating, purchasing, or developing materials or space.

The outcome data may suggest increases in some strategies or decreases in others. Are outcomes sufficient that it makes sense to invest differently, perhaps in prevention efforts over service efforts or other changes? Are there coordination or collaboration efforts that have developed as a result of the program that impact funding needs and opportunities? Part of effectively raising new money is demonstrating that current funding is being used efficiently. This does not mean that a program should look for less money for sustaining programs than for starting them. It does mean demonstrating that you are creating the most success possible with what you have.

Once costs are understood, the next step is to identify the types of financial resources necessary to sustain the work. Is the need for specific dedicated program funding or flexible non-restricted funds? Is the program likely to be best funded by a public source or would philanthropic or corporate funding be more appropriate? Are there new funding sources or relationships with potential funders that have been developed since program start up as a result of legislation or appropriations, program success, changes in board of director membership, and/or community changes such as new employers? Is the program one that might lead to revenue generation from capacity building infusions to program income? It is important for program or organization leaders to identify and act on these opportunities.

The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. The organization or program leaders know how much funding is needed to sustain their work.

B. The organization or program leaders have identified the types of financial resources necessary to sustain their work.

C. The organization or program leaders have identified and are pursuing ways to ensure the most efficient use of existing funds.

D. The organization or program leaders have identified and are pursuing ways to support the redirection or reallocation of funds (for example, using funds freed up through improved outcomes to finance more prevention activities).

E. The organization or program leaders have identified and are pursuing ways to increase the flexibility of existing funding streams (for example, through pooling funds across agency and program lines or improving coordination of existing funding streams).

F. The organization or program leaders have identified relevant funding sources and are taking steps to access these sources.

G. The organization or program leaders have built public-private partnerships to leverage private sector funding, create leadership, and garner technical expertise in support of their work.

H. The organization or program leaders have investigated ways to generate new revenue.

I. The organization or program leaders have identified and are pursuing ways to support the creation of new sources of public or private funds.

HUMAN RESOURCE DEVELOPMENT

The organization or program leaders recruit, engage, manage, and develop the workforce to utilize its full potential in alignment with overall mission, strategy, and action plans.

Human capital resources are the people, knowledge, and skills available to successfully operate the program. These resources are crucial to the resilience of the organization or program. The effort to build these resources starts by recruiting the right team for the program. However, as programs continue, needs may change. The skills and individuals needed to initiate and implement a program may be different than what are needed to sustain a program over time. Further, ideally employees have opportunities to learn, create, and grow in the program across the organization or up a career ladder. So, sustaining human capital requires not just recruiting the right people for the job at start up but developing ways to sustain their development and commitment by including them in the design of the program, methods of sharing program, and other knowledge.

The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. The organization has a human resources strategy to ensure the right people with the right skills are available at the right time.

B. The organization has a professional development process in place to ensure employees continue to learn and develop in ways that strengthen program

C. The organization involves employees as partners/stakeholders, including in the design of professional development and other workforce decisions.

D. The organization has a succession plan for key employees that addresses smooth transition and effective transfer of knowledge.

COMMUNITY RESOURCE DEVELOPMENT

Community resources are twofold. The first is broad-based community support, the awareness and commitment of the community to the program. The second are key-champions, people who are thought leaders who can help build commitment and resources for the program. Below are detailed descriptions of these resources, specifically in light of sustainability.

BROAD-BASED COMMUNITY SUPPORT

The organization or program leaders take steps to involve the community in their work and gain community support based on the program's positive impact.

Broad-based community support in terms of awareness and commitment to the program or organization builds sustainability by helping to identify opportunities; ensuring that funders, particularly community funders, are aware of the program and its importance; and sharing information about the program.

Building this support requires more than just doing a good job. It involves a purposeful effort to establish or maintain a desired identity and reputation within the community. This plan might include sharing program results with clients through written materials, videos in waiting rooms or shared via community television or public service announcements, or by leaders as they work with other partners and colleagues.

This support also is enhanced by involving recipients of services to improve service design and delivery and to build ownership and support. For example, are there structured ways for them to share their experience with organization and community leaders? Are there volunteer opportunities for them in the program?

Equally important for broad-based community support and sustainability is the awareness and support of public and private partners in the community. Preparing for sustainability entails reaching out and building relationships with community-based organizations, government agencies, and private businesses to improve service design and delivery and to build ownership and support.

The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. The organization or program has a plan to establish or maintain a desired identity and reputation within the community.

B. The organization or leaders involve recipients of their services to improve service design and delivery, and to build ownership and support.

C. The organization or program leaders collect quantitative and qualitative data to show the value of their work for families.

D. The organization or program leaders share data in user-friendly formats and communicate them regularly to the community, key stakeholders, media, potential funders, and others.

COMMITTED CHAMPIONS

The organization or program leaders identify potential champions they need to approach on an individual level and follow a plan to do so.

In addition to building broad-based community support, it is also important to connect individually with potential allies and champions such as senior decision makers, local community representatives, and individuals who serve as formal or informal thought leaders. This starts with identifying who potential champions may be and where the common interests and connections are. For example, is the influence needed or available at the community, local, statewide or national levels? Next, it is important to identify who the best person or people are to build the relationships (former clients, staff, board members, volunteers, etc.) and what targeted message is most appropriate.

It is important not only to build the champions initially identified but also to build additional champions over time. As such, it is helpful to use individual connections and also a variety of additional strategies that encourage peer community champions, such as collaborating with other organizations (for example, public and nonprofit service providers) in service planning, delivery, and financing.

Finally, it is important to recognize the commitments, activities, and achievements of key champions. For example, the organization may create an annual award program, create press releases and social media mentions for recognition, or name programs or spaces after those who are instrumental in helping achieve sustainability.

The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. The organization or program leaders have identified key senior decision makers at all levels that can influence its sustainability.

B. The organization or program leaders have designed and implemented a plan for tailored outreach to these key decision makers (including appropriate messengers and messages).

C. The organization or program leaders have and use a variety of strategies to encourage peer community champions, such as collaborating with other organizations (for example, public and nonprofit service providers) in service planning, delivery, and financing.

D. The organization or program leaders recognize and reward people who are instrumental in helping achieve sustainability.

COLLABORATIVE PARTNERS

The organization or program leaders work closely with partners in the community to organize and advocate for community improvement. The third kind of community resource refers to the partners in the community that enable the organization or program to be successful.

The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. In addition to program participants, the organization or program leaders involve a diverse set of stakeholders in their work (such as community-based organizations, government agencies, and private businesses) to improve service design and delivery and to build ownership and support.

B. The organization or program leaders and community partners understand and communicate the work's value for its community.

SYSTEMIC RESOURCES

The organization has strong internal processes that ensure a vibrant, durable, and a continuously improving program/organization.

While "systemic resources" refers to the full array of systems that support programs and agencies, the focus here is on financial and information systems. Strong financial systems are crucial to funders as they demonstrate the capacity of a program or organization to steward the funds they invest.

Strong financial systems are systems that allow program and organization leaders to stay informed on current status from financial health at the organization end of the spectrum to real time actual expenses to budget projections for individual programs. It also means accounting and procurement systems that meet or exceed audit standards.

From an information systems perspective, sustainability also requires that program staff and organizational leaders have solid information on program status not only from a fiscal perspective, but also from an employee and client perspective, so they can effectively manage their programs and communicate with internal and external partners about successes, challenges, needs, and opportunities.

The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. The organization has strong fiscal processes that allow leaders to stay informed on current financial status and to be alerted to emerging financing concerns.

B. Staff and board develop and review projections for performance as well as revenue and expenses.

C. The organization has strong internal systems (for example, accounting, auditing, management information, procurement, personnel) to maintain quality control over its work.

D. The organization has strong communication processes to ensure that all partners have input and are kept informed.

RESILIENCE

The organization leaders seek new opportunities for resource development and are able to respond to new opportunities as they arise.

As we have learned in the last few years, the environment we work in is ever changing. There are funding losses and increases, our population and their needs change rapidly, and the expectations of programs and organizations continue to increase.

Success amidst the fluidity in the environment demands flexibility and foresight to be prepared to adjust to losses and capitalize on opportunity. Leaders need to monitor changes in the policy and program environment to see how their program/organization can align with new directives and agendas. It is important as well to determine how the program and the outcomes it seeks to achieve can be framed or positioned to engage different policy makers and funders and to take advantage of new financing opportunities.

Sustainability also requires reaching beyond the program and organizational boundaries to those people and organizations committed to similar outcomes to participate in efforts to improve the overall policy and program environment. This is both a way to monitor change and to influence it. Actively participating in decision-making processes about changes in policy and practice not only provides the opportunity to influence those decisions but also to garner recognition and support by the other leaders involved.

The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. The organization has the equivalent of 25 percent of annual expenditures in a reserve fund.

B. The organization has policies and procedures in place for using reserve funds.

C. The organization leaders monitor changes in the policy and program environment to see how the program can align with new directives and agendas.

D. The organization leaders consider how work can be framed or positioned to interest different funders and to take advantage of new financing opportunities.

E. The organization leaders identify opportunities to participate in efforts to improve the overall policy and program environment.

F. The organization leaders actively participate in decision-making processes about changes in policy and practice.

G. The organization leaders determine how they can improve their ability to participate in these efforts (for example, by establishing credibility as technical experts, community representatives, or controllers of resources), and have followed through to increase the likelihood of being able to participate.

SUSTAINABILITY PLAN

THE ORGANIZATION HAS A SUSTAINABILITY PLAN THAT ENABLES IT TO SET PRIORITIES AND TAKE ACTION.

In the end, sustainability is not about finding new funding just as the current funding ends, but is a thoughtful process of building support along the way so that resources are available when needed.

The Sustainability Assessment Tool examines these ideas through progress rankings on the following statements:

A. The organization leaders have a long-term plan for what they want to accomplish.

B. The organization leaders have identified challenges or obstacles to sustaining the program, including potential conflicts with alternative programs or agendas.

C. The organization leaders have developed strategies to garner needed resources and overcome identified barriers.

D. The organization leaders have a process to reassess and adjust their plan periodically.

E. The organization leaders have identified and communicated with other individuals who have a role in the sustainability plan.

Sustainability Assessment Tool

The elements of sustainability, along with tasks specific to each element, are described below. Rank your progress on each of these tasks according to a five-point scale that assesses whether the program's leaders:

1 = Have not started this task

2 = Have started initial conceptual and planning work

3 = Have begun to implement this task

4 = Have made solid progress in implementing this task/ regularly conduct this task

5 = Have made sufficient progress in completing this task

ELEMENT: VISION

The organization or program leaders have partnered with the community to develop a clear vision of what they want to achieve

	1	2	3	4	5
The organization or program leaders have and can articulate a clear vision of the desired future state of the community.					
COMMENTS					

ELEMENT: MISSION

The organization or program leaders have a clear mission and the relationship of that mission to the vision and know what they want to sustain.

	1	2	3	4	5
A. The organization or program has a clearly articulated mission.					
B. The organization or leaders have developed a process to determine what is to be sustained and by whom.					
C. The organization or program leaders have decided what they want to sustain (for example, an organization, features of a program, a process, a service, a particular practice, a method of operation).					
D. The organization or program leaders have analyzed and can articulate how each program fits (or could fit) within the larger community.					
E. The organization or program leaders have analyzed and can articulate how the organization or program compliments, yet is distinguishable from, other organizations or programs.					
COMMENTS					

ELEMENT: RESULTS ORIENTATION

The organization or program incorporates processes to establish, track and utilize outcome measures. The organization or programs leaders use that information to improve their work over time.

	1	2	3	4	5
A. The organization or program leaders have an accepted logic model that shows how its work fits into a range of efforts to improve the lives of low-income families and communities.					
B. The organization or program leaders have identified and use performance measures to track the progress of their work.					
C. The organization or program leaders use performance measures to plan its work and budget its resources.					
D. The organization or program leaders examine data on these measures to identify means to improve service design and delivery.					
E. The organization or program leaders implement these ideas, including changing or discontinuing programs or services as necessary.					
F. The organization or program staff and board collaborate with other organizations and programs on improvements to community-wide indicators.					

COMMENTS

ELEMENT: STRATEGY

The organization or program leaders have identified concrete actionable program and advocacy strategies to address the mission driven results it seeks to achieve.

	1	2	3	4	5
A. The organization or program leaders have identified strategies that bridge programs to effectively achieve results for low-income families and communities.					
B. The organization or program leaders have identified advocacy strategies to address both those results they will directly address and those mission driven results that may be outside the programmatic strategies.					
C. The organization or program leaders have determined who is responsible for leading the strategy.					
D. The organization or program leaders have identified and developed partnerships between programs or other agencies to effectively implement the strategies.					
E. The organization or program leaders adapt and strengthen these strategies based on results and progress data.					
F. The organization or program leaders regularly assess strengths and weaknesses related to strategies and adapt them as needed.					
G. The organization or program leaders identify opportunities and challenges that impact the achievement of results and adapt strategies as needed.					

COMMENTS

1 = Have not started this task   **2** = Have started initial conceptual and planning work   **3** = Have begun to implement this task
4 = Have made solid progress in implementing this task/regularly conduct this task   **5** = Have made sufficient progress in completing this task

ELEMENT: STRATEGIC RESOURCE DEVELOPMENT
Financial Resource Development

The organization or program leaders have identified a variety of resource strategies that could support the organization or program. The organization or program leaders have a plan to pursue those strategies and are following that plan.

	1	2	3	4	5
A. The organization or program leaders know how much funding is needed to sustain their work.					
B. The organization or program leaders have identified the types of financial resources necessary to sustain their work.					
C. The organization or program leaders have identified and are pursuing ways to ensure the most efficient use of existing funds.					
D. The organization or program leaders have identified and are pursuing ways to support the redirection or reallocation of funds (for example, using funds freed up through improved outcomes to finance more prevention activities).					
E. The organization or program leaders have identified and are pursuing ways to increase the flexibility of existing funding streams (for example, through pooling funds across agency and program lines or improving coordination of existing funding streams).					

COMMENTS

ELEMENT: STRATEGIC RESOURCE DEVELOPMENT
Financial Resource Development

The organization or program leaders have identified a variety of resource strategies that could support the program. The organization or program has a plan to pursue those strategies and is following that plan.

	1	2	3	4	5
F. The organization or program leaders have identified relevant funding sources and are taking steps to access these sources.					
G. The organization or program leaders have built public-private partnerships to leverage private sector funding, create leadership, and garner technical expertise in support of their work.					
H. The organization or program leaders have investigated ways to generate new revenue.					
I. The organization or program leaders have identified and are pursuing ways to support the creation of new sources of public or private funds.					

COMMENTS

1 = Have not started this task   **2** = Have started initial conceptual and planning work   **3** = Have begun to implement this task
4 = Have made solid progress in implementing this task/regularly conduct this task   **5** = Have made sufficient progress in completing this task

ELEMENT: STRATEGIC RESOURCE DEVELOPMENT
Human Resource Development

The organization or leaders recruit, engage, manage, and develop the workforce to utilize its full potential in alignment with overall mission, strategy, and action plans.

	1	2	3	4	5
A. The organization has a human resources strategy that ensures the right people with the right skills are available at the right time.					
B. The organization has a professional development process in place to ensure employees continue to learn and develop in ways that strengthen the program.					
C. The organization involves employees as partners and stakeholders and in the design of professional development and other workforce decisions.					
D. The organization has a succession plan for key employees that address smooth transition and effective transfer of knowledge.					
COMMENTS					

ELEMENT: STRATEGIC RESOURCE DEVELOPMENT
Community Resource Development – Broad-Based Community Support

The organization or leaders take steps to involve the community in their work and gain community support based on the program's positive impact.

	1	2	3	4	5
A. The organization or leaders have a plan to establish or maintain a desired identity and reputation within the community.					
B. The organization or leaders involve recipients of their services in their work to improve service design and delivery and to build ownership and support.					
C. The organization or leaders collect quantitative and qualitative data to show the value of their work for families.					
D. The organization or leaders share data in user-friendly formats and communicate them regularly to the community, key stakeholders, media, potential funders, and others.					
COMMENTS					

1 = Have not started this task   **2** = Have started initial conceptual and planning work   **3** = Have begun to implement this task
4 = Have made solid progress in implementing this task/regularly conduct this task   **5** = Have made sufficient progress in completing this task

ELEMENT: STRATEGIC RESOURCE DEVELOPMENT
Community Resource Development – Committed Champions

The organization or leaders identify potential champions they need to approach on an individual level and follow a plan to do so. These champions include senior decision makers, local community representatives and peer programs and organizations, and individuals.

	1	2	3	4	5
A. The organization or leaders have identified key senior decision makers at the all levels who can influence its sustainability.					
B. The organization or leaders have designed and implemented a plan for tailored outreach to these key decision makers (including appropriate messengers and messages).					
C. The organization or leaders have and use a variety of strategies to encourage peer community champions, such as collaborating with other organizations (for example, public and nonprofit service providers) in service planning, delivery, and financing.					
D. The organization or leaders recognize and reward people who are instrumental in helping achieve sustainability					
COMMENTS					

ELEMENT: STRATEGIC RESOURCE DEVELOPMENT
Community Resource Development – Collaborative Partners

The organization or leaders work closely with partners in the community to organize and advocate for community improvement

	1	2	3	4	5
A. In addition to program participants, the organization or program leaders involve a diverse set of stakeholders in their work (such as community-based organizations, government agencies, and private businesses) to improve service design and delivery and to build ownership and support.					
B. The organization or leaders and community partners understand and communicate their value for the community.					
COMMENTS					

1 = Have not started this task   **2** = Have started initial conceptual and planning work   **3** = Have begun to implement this task
4 = Have made solid progress in implementing this task/regularly conduct this task   **5** = Have made sufficient progress in completing this task

ELEMENT: SYSTEMIC RESOURCES

The organization has strong internal processes that ensure a vibrant, durable and continuously improving program/organization.

	1	2	3	4	5
A. The organization has strong fiscal processes that allow leaders to stay informed on the current financial status and to be alerted to emerging financing concerns.					
B. The staff and board develop and review projections for performance as well as revenue and expenses.					
C. The organization has internal systems (for example, accounting, auditing, management information, procurement, personnel) to maintain quality control over its work.					
D. The organization has strong communication processes to ensure that all partners have input and are kept informed.					

COMMENTS

ELEMENT: RESILIENCE

The organization or leaders seek new opportunities for resource development and are able to respond to new opportunities as they arise.

	1	2	3	4	5
A. The organization has the equivalent of 25 percent of annual expenditures in a reserve fund.					
B. The organization has policies and procedures in place for using reserve funds					
C. The organization or leaders monitor changes in the policy and program environment to see how their program can align with new directives and agendas.					
D. The organization or leaders consider how work can be framed or positioned to engage different funders and to take advantage of new financing opportunities.					
E. The organization or leaders have identified opportunities to participate in efforts to improve the overall policy and program environment.					
F. The organization or leaders actively participate in decision-making processes about changes in policy and practice.					
G. The organization or leaders have determined how they can improve their ability to participate in these efforts (for example, by establishing their credibility as technical experts, community representatives, or controllers of resources), and have followed through to increase the likelihood of being able to participate.					

COMMENTS

1 = Have not started this task   **2** = Have started initial conceptual and planning work   **3** = Have begun to implement this task
4 = Have made solid progress in implementing this task/regularly conduct this task   **5** = Have made sufficient progress in completing this task

ELEMENT: SUSTAINABILITY PLAN

The organization or program has a sustainability plan that enables it to set priorities and take action.

	1	2	3	4	5
A. The organization or leaders have a long-term plan for what they want to accomplish.					
B. The organization or leaders have identified challenges or obstacles to sustaining the program, including potential conflicts with alternative organizations, programs or agendas.					
C. The organization or leaders have developed strategies to garner needed resources and overcome identified barriers.					
D. The organization or leaders have a process to reassess and adjust their plan periodically.					
E. The organization or leaders have identified and communicated with other individuals who have a role in the sustainability plan.					

COMMENTS

1 = Have not started this task   **2** = Have started initial conceptual and planning work   **3** = Have begun to implement this task
4 = Have made solid progress in implementing this task/regularly conduct this task   **5** = Have made sufficient progress in completing this task