Sustainability Planning Checklist

Use this checklist to identify gaps in your sustainability planning.

# BUDGET PLANNING

* **Start-Up Budget:** Review your program start-up budget. Identify critical expenses to clarify your minimum cost to start-up.
* **Operating Budget:** Review your operating (after start-up) budget. Identify critical expenses to clarify your minimum cost to operate.
* **Medical Assistance Rate:** For applicable programs, ensure that your budget identifies costs that can be covered with M.A (Medical Assistance). dollars.

# COST EFFICIENCY

* **Supply Costs:** Can you share materials across staff, find better prices, or eliminate non-essential supplies?
* **Location:** Can you utilize a low-cost or no-cost venue (e.g., schools, places of worship)?
* **Volunteers and/or Interns:** Reach out to local agencies, universities, service clubs, and faith- based groups to identify individuals willing to share their time and talents.
* **Tasks and Responsibilities Strategy:** Assign the most cost-effective staff person to each task.

Consider staff work location, capabilities, and level of compensation.

* **Existing Systems:** Can you reduce overhead costs by utilizing an existing service structure or staff to deliver your program?
* **Within-Agency Training:** Having an in-house trainer can reduce the cost of training new staff.
* **In-Kind Donations:** Approach local businesses and service groups for donations of supplies and other tangible needs.

# PROGRAM REVENUE STREAMS

*High Priority, Long Term Sources*

* **County Needs Based Budget:** Research how your program can help meet the county’s needs and priorities. These budgets are formulated two years in advance, so connect early with county officials who make budget decisions.
* **School District:** Research how your program can help meet your district’s needs and priorities.

Connect early with school board officials who make budget decisions.

* **Medical Assistance / Commercial Insurance:** If your program is eligible for insurance reimbursement, initiate credentialing as soon as possible. Enrolling can take a year or longer.

*Lower Priority, Short Term or One-Time Sources*

* **Fundraising:** Connect with agency-wide fundraising efforts. Consider a fund-raising event.
* **Corporate Sponsorship:** Large businesses can be a source of one-time or on-going financial support.
* **Foundation and Local Grants:** A grant may help to provide bridge funding as you transition to a long-term funding plan.

# DATA AS A SUSTAINABILITY TOOL

* **Data Collection:** Make data collection a permanent practice; fidelity and outcome data play a valuable and enduring role in high quality, sustainable program implementation.
* **Quality Improvement:** Establish a process for regularly reviewing and using program data to identify areas of success and needed improvements.
* **Marketing and Outreach:** Ensure that data are used to communicate program impact.
* **Public Health Impact:** Use local data sources to determine changes in community needs identified in your project proposal (e.g., placement rates, referrals to child welfare).
* **Program Relevance:** Use data to show a match between your program and local needs.

# STAKEHOLDER ENGAGEMENT

* **Stakeholder Identification:** Who has a stake in your program and how might they play a part in its success or failure? Which of these has the biggest potential impact?
* **Communication:** Routinely share program success with stakeholders; both anecdotal victories and data demonstrating program impact.
* **Coalition Involvement:** Ensure your program has a relationship with coalitions to stay abreast of what is happening in the community and build relationships with community partners.
* **Program Visibility:** Consider ways to increase public awareness of the value of your program.

# STAFF RETENTION & DEVELOPMENT

* **Staff Retention:** Identify the factors that contribute to staff turnover and develop a plan for supporting and maintaining staff.
* **Model Fidelity:** Ensure leadership is providing staff with the resources and support needed to continue implementing the program with quality.
* **Maintaining Expertise:** Ensure staff have connections with others disseminating the same program, such as the program developer, technical assistance providers, and provider networks.
* **Planning for Training:** Support staff’s on-going development by budgeting for staff development costs and having policies that support staff training time.

# PROGRAM PARTICIPATION

* **Recruitment:** Work with staff, coalition(s), and families to develop strategies for building your referral base and keeping referral sources engaged
* **Retention:** Identify barriers to participation and engagement. Ensure your program includes incentives and resources to overcome these barriers.