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. 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 year 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 boards 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.

EPISCenter

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 have 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.