

## Creating Successful and Sustainable Programs

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Sample Training Workbook

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## Overview

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### Purpose

- To introduce a proven approach to help public health agencies and organizations be more potent, indispensable, and sustainable.

### Outcomes

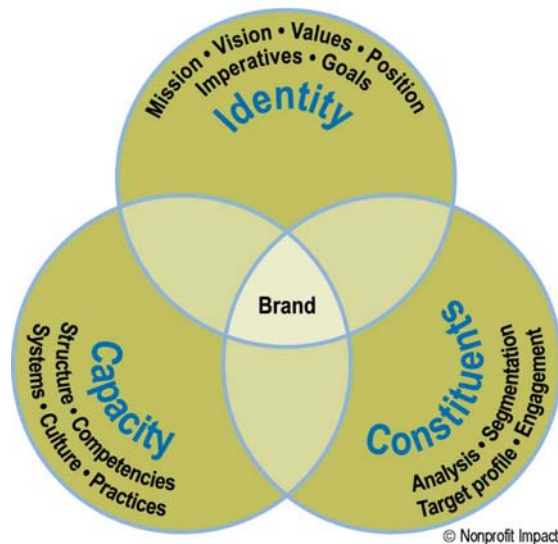
At the end of this session, participants will be able to:

- Apply an Integrated Strategy to create a more sustainable program
- Position the program / organization for visibility and influence
- Create a more loyal, engaged constituency
- More build and leverage brand for a stronger, healthier, more sustainable effort.

### Agenda

- Introductions and Overview
- *The Integrated Strategy*
- Sustainability – Frameworks, Definitions, Considerations
- Creating Sustainable Programs: Identity, Constituents, Capacity
- Delivering on the Promise of the Brand
- Creating a Sustainability Plan
- Summary and Closing Remarks

### Integrated Strategy



Organizations / programs with a strong, consistent, coherent identity; a broad-based, engaged and loyal constituency; and the capacity to do the work are successful and sustainable. Brand emerges from the integration of identity, constituents, and capacity. Brand is what makes the organization distinct and distinguishable. It is that distinction that attracts the support and resources necessary to sustain a program.

### Sustainability

Having the human, financial, technological, and organizational resources to provide services to meet needs and attain results towards mission on an *ongoing basis*.

Sustainability requires the organizational / programmatic infrastructure to carry out core functions *independent of individuals or one-time opportunities*.

At a community / social change level, sustainability implies behaviors that are integrated, ingrained, and indispensable across the socio-ecological model (from individual, to community, to policy).

## Sustainability Plan

A sustainability plan is analogous to a business plan in the private sector. The plan defines the necessary strategies, staffing, financial resources, structure, management, and marketing to ensure the successful future of an enterprise (i.e. program, business, or organization).

A sustainability plan is a tool to define a comprehensive, deliberate, thoughtful approach to creating a sustainable entity. A good plan will serve as a blueprint that guides strategic, operational, and development decisions towards some predetermined result.

The plan is also a tool to translate public-good programs into a language understood by the private sector, policy makers, and decision makers. It can be used to attract interest, commitment, and investment.

The planning process also serves as a feasibility analysis. In some cases, the plan will demonstrate that in fact the enterprise *cannot* be feasible or sustainable given certain conditions.

## Sustainability Plan Outline

1. Introduction
2. Situation Analysis
  - a. Context, trends, issues
  - b. Current and future influencing forces
  - c. Institutional landscape
3. Identity
  - a. Mission, vision, values
  - b. Impacts, imperatives, and strategic goals
  - c. Core focus and strategic issues
4. Constituents
  - a. Segments: How the constituent relates to the organization
  - b. Core constituents: Demographics and psychographics profile
  - c. Publics and stakeholders
  - d. Offerings: Programs, products, services, issues, or campaigns
  - e. Outreach strategies: Marketing, public relations
  - f. Strategic alliances / partnerships
5. Organizational Alignment
  - a. Structure: Roles, responsibilities, authority, and accountability
  - b. Competencies and functions: Skills, surpluses and gaps
  - c. Systems: Information management and protocols
  - d. Culture: collective attitudes and values
  - e. Coalitions and committees: Purpose, responsibility, and accountability
6. Revenue Model
  - a. Funding needs
  - b. Sources
  - c. Projections
  - d. Policies and management
7. Transition and Implementation
  - a. Transition issues
  - b. Action plan

## Definitions

***Constituent-centered:*** Aligning all aspects of an organization around an understanding of the core constituent to create loyal, engaged, long-term relationships.

***Core constituents:*** Those people who are necessary to the success of your organization. They are the people that you serve, or that are necessary in order for you to meet strategic goals in programs, marketing, and fundraising. They are an integral component, without which the organization would have little meaning. The core is your target market – those who care or potentially care enough about the organization or cause to take significant, meaningful action on its behalf.

***Integrated strategy:*** Aligns identity, constituency, and capacity to concentrate all organizational resources to create a more successful and sustainable organization and build brand equity.

***Positioning:*** A systematic, analytical process to define the organization's place and niche within its sphere of influence, or potential sphere.

***Outreach strategies:*** The groups of activities to reach and engage the core constituency. Strategies include programming, services, direct contact, events, and earned media. Outreach strategies are more than an organization's message or communications plan.

***Brand:*** The endearing and enduring characteristics of an organization – the organization's essence. It is what makes an organization distinct and distinguishable. It is often referred to as the emotional or visceral response that is evoked by the organization (or product). Brand is everything an organization does, not just what it says, and thus is linked to an organization's reputation and integrity.

***Capacity:*** The human, financial, technological, and organizational resources to provide necessary services to meet needs and attain results towards mission.

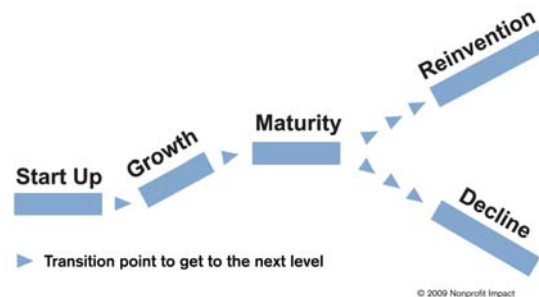
## Understanding Sustainability

### A Systems Approach

- Organizational development based on systems approach; a deliberate and planned effort to optimize all resources towards productivity and achieving goals.
- Organizations are influenced by the environment in which they operate and influence that environment; must adapt or die.
- All pieces are interconnected. Dynamic equilibrium: change in one part requires equal and opposite change in another.
- Systems have inputs, processes, outputs, and feedback loops.

*Sustainability is more than fundraising and capacity building*

### Organizational Lifecycles



### Considerations for Sustainability

- The project or program is intentional and supports documented community needs (not just a way to chase money).
- There is a commitment from management that program is necessary whether or not there is immediate grant funding.
- Some portion of the program is supported through ongoing operations or institutional budget.
- Results (even long term) are defined and measurable (not just activities).
- The program directly relates to the organization / agency strategic focus areas or goals (is critical to success, not just nice to have).
- The program has a clear identity within the organization / agency but is integrated with other programs.
- The program builds a supportive constituency beyond the “usual” players.
- Diversified funding is determined feasible and is part of program development.

## Examples

### *What we've learned from health program related sustainability analyses...*

- Annual action planning doesn't support more long-term, sustainable efforts
  - Sustainable efforts sometimes require more strategic (deliberate choices) and long-term strategies, rather than immediate wins.
- Transitional or transitory staffing (staffing defined by grant cycle) is an obstacle to creating long term relationships necessary for sustainability.
- Program level coordinators (working with peers at a program level around activities) do not have the authority to develop higher-level connections necessary for long term sustainability.
- Emphasis on process outcomes which tend to focus on numbers is an obstacle to focusing on a few higher level and more deliberate systemic change processes.
- Being embedded in a public agency (health, schools) prohibits generating resources from sources other than grants.
- Typically, program coordinators do not have the time, responsibility, or authority to develop external relationships and to generate significant, long-term revenue.

### *Solutions:*

- Understand the larger operating environment and your "place" in that context.
  - Trends and issues; competitors
- Create the longer-term strategic plan and measure daily decisions with the long term in mind.
- Get high-level leadership to convene the strategic advisory group that does the long-term planning and makes the tough decisions.
- Understand and integrate the program throughout the organization – from the beginning.
- Create a strategic alliance external to the public agency to champion the program, raise money, or do the politics (or create your own friends group).
- Understand the core functions that must be sustained.
- Define (from the beginning) what your sustainable effort will look like. It is not typically ALL the activities funded by a grant. Be realistic. Be clear about what will NOT be sustained and why.

*Are all organizations and programs sustainable?*

**Should all programs be sustainable?**

## Creating Sustainable Programs

### Strategic Planning

*Strategic: calculated and deliberate decisions based on internal, external, and market context and current and future trends and conditions; organization-wide, cutting across all programs and divisions.*

- The Plan
  - Mission, vision, values
  - Imperatives
  - Goals
  - Objectives
- The Process
  - Situation analysis
  - Strategic decisions
  - Direction setting
  - Implications



### Strategic Positioning – Critical in Becoming Indispensable

- Become a “must have” not a “nice to have”
- Understanding, defining, and occupying a distinct niche and “owning” that niche to provide competitive advantage
- Leverage value and assets to create distinction in a sphere of influence
- Defines opportunities, gaps, and competitive advantage
- Defines the program’s footprint or sphere of influence
- Provides opportunity to go to next level



*Positioning quite literally defines the tables at which you sit*

## Positioning Process

- Analysis
- Positioning alternatives
- Implications
- Decisions
- Strategic planning
- Organizational alignment

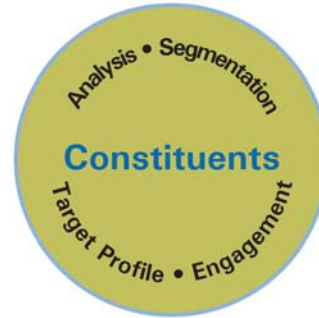
## Worksheet I: Identity

- What difference do you want to make – i.e. the impact you want to have?
- What is the two to three sentence program description?
- What is your strategic focus? Can you list the three or four core goals / outcomes?
- What are the measurable results of your activities and what data do you have to demonstrate results? (Achievements)
- What position does the program occupy? What is your distinct niche?
- What would an indispensable, integrated program look like?
- What is the single, consistent message?

## Marketing

*A process of defining and analyzing the market to provide products/ services/ offerings and to design outreach strategies to best resonate with the market.*

- Process
  - Market analysis
  - Segmentation
  - Target markets
  - Product/ services/ offerings
  - Outreach
    - Direct contact
    - Media relations
    - Events and promotions
    - Advertising
  - Public relations
  - Partnerships



## Constituent Centered

- Marketing connotes understanding the audience so we can get them to do something we want.
- From “what we want them to be” to “who they are” and how they relate to the product or service.
- Being constituent centered integrates constituents into everything you do and...sees the world through the eyes of the constituent.
- Creates meaningful, two-way relationships, long term, sincere (care about the other).
- Moves from awareness, to action, to engagement, to loyal, long-term commitment.
- Everyone becomes a “constituent relationship manager.”

	Organization-centric	Constituent-centric
Goal	Activity focus: What do we do	Constituent focus: What does our constituent need (within parameters of mission)?
Methods	Best practices	Client-centered, community-centered
Position	Relative to other programs, grants	Relative to the child, family, community needs
Offerings	By activity, grant directed	People and community driven
Outreach	The program, we, I messages; us and other	Community, your, you messages; us
Committees	Coalitions and engaged few “the choir”	Deliberate players at the table
Processes	Functions distinct from marketing, outreach, communication	Functions integrated with marketing, outreach, communication

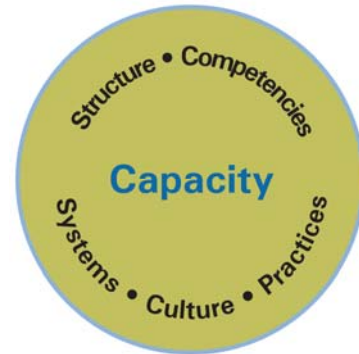
## Worksheet II: Constituents

- Describe your community relative to your program.
  
- Who are your core constituents and why?
  
- Describe your core constituent's values, attitudes, lifestyles, and behaviors relative to the program?
  
- How do you reach and engage core constituents to lead to long-term engagement and support? (Programs and outreach strategies)
  
- What do you do for your constituents on a regular ongoing basis?
  
- Who are your publics (as compared to the core constituents) and how do you maintain positive community relationships?
  
- What are your two or three key strategic partnerships? What do you bring to the partnership and what do you expect in return? What do you do to make the partnership a viable, long term, mutually beneficial one?

## Organizational Development

*A multi-disciplinary, systems approach to enhance and improve individual and organizational performance and effectiveness. About change and growth.*

- Process
  - Analysis
  - Critical issues
  - Structure, staffing, culture
  - Leadership and governance



## Alignment

Organizational alignment develops the organization to align with strategic position and core constituents.

- Process: Creating capacity
  - Analysis
  - Defining the business model
  - Redefining assets
  - Organizational alignment
  - Institutional standards, policies, and practices
  - Institutional “memory”

Component	Definition	Includes
Practices	The fundamental description and purpose and how the organization conducts its work.	Defined by mission, vision, and values. Carried out through goals, methods, and strategies.
Structure	The fundamental “shape” of an organization, where functions are placed, reporting relationships, and lines of communication.	Most commonly defined by the organization chart. The centralization and de-centralization of functions, integration and coordination, authority, responsibility and accountability.
Competence	The ability and resources available to carry out core functions. In nonprofits, competence lies in staff and with voluntary leadership (the board) and volunteers.	Includes organization’s real and perceived skills, abilities, and aptitudes. Generally defined by staffing patterns - having the right number of people with the right skills - available to do the right work. Includes issues of professional development, employee and volunteer satisfaction and safety and succession.
Systems	Those tangible and intangible, formal and informal systems or procedures that facilitate practices and ensure consistency, accountability, historical integrity, and organization sustainability.	Includes management information systems (financial, contacts, human resources, etc) and how those systems are integrated. Also includes evaluation and performance appraisal systems and processes, project approval processes or resource allocation processes, workflow and decision making.
Culture	The style, feel, tone, collective attitude, or personality that permeates an organization. Shaped by the written and unwritten rules of behavior, leadership style, history, and assumptions that are passed between employees.	Includes the policies, rules, and patterns of behavior and adaptation, rituals and assumptions. Demonstrated by language, style, and habits.

### Worksheet III: Capacity

- What are the core functions (groups of activities) necessary to achieve strategic goals? What are the supporting functions?
  
- What is the staff composition and structure that is most appropriate to support the work of the organization?
  
- What does each individual who sits on your committee, advisory group, or coalition bring to the table and why are they there?
  
- What is the explicit and “contractual” role, responsibility, and accountability of external committees, advisory groups, or coalitions?
  
- How do your systems facilitate the accomplishment of goals and support the positive culture of the organization?
  
- How are all systems and roles integrated to promote identity and reach core constituents?

## Brand

- Emerges from being who you are – consistent and constancy of purpose and direction
- Your distinct “personality”
- The essence emerges
- A strong brand, position, and image gives you power to reach people, to help people make choices, and to achieve strategic goals.

## Worksheet IV: Brand

What is the essence of the program? (What is at the heart of identity, constituents, and capacity?)

How is the brand communicated in everything you do?

How do you monitor for brand promotion to ensure constancy and consistency?

*For additional information about the information presented here, or other organizational development tools, please contact Jennifer Burstein at [jennifer@nonprofitimpact.com](mailto:jennifer@nonprofitimpact.com) or call the Nonprofit Impact office at 303.223.4886.*

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Nonprofit Impact specializes in organizational development consulting services to nonprofits and public agencies nationwide. Our services include strategic planning and positioning, marketing, fundraising, and organizational analysis and development. We help our clients go to their next level of success.

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