

# MICHIGAN SUSTAINABILITY TOOLKIT







## IN THIS GUIDE

INTRODUCTION	3
STEP 1: SET THE COURSE	7
STEP 2: EXPLORE THE LEVERS	13
PROGRAM MANAGEMENT	14
DATA AND EVALUATION	20
FUNDING AND PARTNERSHIPS	26
STORYTELLING	31
STEP 3: CREATE AND MONITOR THE PLAN	36
CONCLUSION	42
APPENDIX	43

# INTRODUCTION

To support early childhood system sustainability efforts, the Michigan Office of Great Start (OGS) has partnered with School Readiness Consulting (SRC) to support regional early childhood leaders and grantees. This project is supported by Preschool Development Grant Birth-Five (PDG B-5) resources awarded to Michigan in 2019 and renewed for 2020-2022. This project consists of tiered supports including webinars, resources, and a community of practice (CoP). While this toolkit was developed for this specific effort, the hope is that this can also be a useful resource and support for all early childhood stakeholders in communities across the state looking to sustain valued programming and services for young children and their families.



## THE PURPOSE OF THE TOOLKIT...

This toolkit was primarily designed to support the regional teams participating in the PDG B-5 Sustainability Community of Practice facilitated by SRC. At the same time, the toolkit is also intended to be a useful tool for a wide range of stakeholders in Michigan's early childhood system interested in sustainability. As teams of early childhood leaders begin to consider next steps to sustain their programs and other initiatives, this toolkit aims to support the process by exploring each of the key three steps at the core of sustainability planning.

## ...AND HOW TO USE IT

This toolkit invites those interested in sustainability to focus on both reflection and action, as teams address the challenges and celebrate the successes of program and initiative sustainability. The toolkit is a flexible guide designed to be used either in full or in sections, if you would like to identify and pull out the specific resources most needed to continue work in your communities.



The toolkit has been organized into sections that align to the three steps to develop a sustainability plan: Step 1, Set the Course; Step 2, Explore the Levers; and Step 3, Create and Monitor the Plan. Each section provides an opportunity to dive more deeply by providing a concrete set of resources and guidance as your team moves through developing their plan. Each section will begin with a brief introduction to share “why it matters” and define specific strategies that may be important to consider for sustainability. The section will also include an opportunity to think deeply about a particular aspect of the concept (**THINK**) and identify opportunities to take action (**DO**), as well as

offering a list of resources to explore (**EXPLORE**). As you read through the toolkit, you will also notice that webinar recordings have been woven in throughout that highlight a set of experts from the field selected to provide additional insights and support the work of the Sustainability Community of Practice. The overall goal is that this toolkit offers the resources needed to guide an effective planning process for your team that ends in a robust, actionable plan to sustain the early childhood programs that are integral to your communities.

As you read through the guide, you will find that each of the three main sections contains the following subsections:



**THINK:** a reading or recording with reflection questions to help you think critically



**DO:** key steps and tips to help you take action



**EXPLORE:** additional resources to support further action





# WHAT IS SUSTAINABILITY?

**sus·tain`a·ble:** n. capable of being prolonged; to keep up; to withstand.<sup>1</sup>

In its most simple form, sustainability refers to a program's ability to continue its efforts with the needed resources and support. For many programs, this means looking at the program's financial health and either increasing overall funding or decreasing the dependence on a particular funding source. However, while funding is critical to the viability of programs, sustainability in practice is a dynamic process with several levers—from considering different aspects of program management to measuring and communicating successful outcomes. All programs and their leaders have the opportunity to better understand sustainability by looking beyond funding at all of the levers of sustainability.



**“ More often than not, sustainability is thought to mean raising money. But money is only part of the equation. In fact, you can't raise money without having a quality program, and you can't prove you have a quality program unless you can show results, and you can't show effective results unless you have good management practices ... and so it goes. Sustainability, therefore, is many things that in combination make something capable of lasting over time. ”**

**- The National Center for Community Education**  
*After-school Alliance Sustainability Workbook (p. 2)*

## WHY PLAN FOR SUSTAINABILITY?

Developing a sustainability plan is a critical part of the overall sustainability process. Unlike other planning processes, good sustainability planning starts early in program implementation and is ongoing—rather than a one-time event. Sustainability planning is often focused on the long term and is key to institutionalizing important community supports and services for young children and their families.





A well-crafted sustainability plan should be actionable, achievable, and include a process for monitoring successes and identifying challenges over time. Overall, your sustainability plan can serve as a road map that outlines key strategies for how the program will operate and meet the needs of the community in an ongoing way.

The most effective sustainability plans are often designed by groups of stakeholders to obtain a range of input and perspectives, as well as to garner buy-in. This may include assembling an inclusive and diverse planning team made up of decision-makers, community voices, and those closest to the services offered.

To develop the actual plan, the following steps may be used as a starting point with your team and can involve setting a clear vision, examining multiple levers of sustainability, and monitoring actions in an ongoing way.

**“Make sustainability planning as tangible as implementation planning.”**

**- Resource Guide for Building Sustainable Programs<sup>2</sup>**

## DEVELOPING A SUSTAINABILITY PLAN

### STEP 1

#### SET THE COURSE

Clarify your vision and goals for sustainability

### STEP 2

#### EXPLORE THE LEVERS

Use levers to examine and inform strategies to sustain programming:

- Program management
- Outcome data
- Funding and partnerships
- Storytelling

### STEP 3

#### CREATE AND MONITOR THE PLAN

Create a plan with concrete action steps and monitor implementation



# STEP 1

## SET THE COURSE





# WHY THIS MATTERS

**“If you don’t know where you are going, any road will get you there.”**

– LEWIS CARROLL<sup>3</sup>

A vision for sustainability communicates what your team believes are the ideal conditions for the community—how things would look if families and young children had sustained access to important services and supports. An effective vision statement serves two purposes: **(1) it has the ability to inspire and motivate others toward helping you achieve your goals**, and **(2) it provides your team with a clear line of sight and a standard for planning and decision-making as you move ahead**. Ultimately, a collective vision can be useful in defining and maintaining a long-term focus, which leads to a greater level of ongoing commitment to the effort.

Once a vision for sustainability is in place, the next step is to answer this question: What is the role of this team in ensuring programs are sustained? Or, in short, **WHAT** are we going to do, and **WHO** will benefit? Here the team will be engaged in laying out some concrete, action-oriented goals that can serve as a road map for how the team will build understanding and capacity to sustain important community programs and services. The goals should offer clear statements of what the team will do and could include references to the outcomes to be sustained or improved, strategies to be sustained, and resources needed.<sup>4</sup>



## STRATEGIES TO CONSIDER FOR SUSTAINABILITY PLANNING

- **CREATE A VISION:** Identify the ideal state the team and community is striving for in the long term.
- **IDENTIFY GOALS:** Define what the team will do to build sustainable programs and who will benefit.

## WEBINAR SERIES

WATCH THE WEBINAR [HERE](#)



**FEATURING:** Junious Williams, J.D., principal of Junious Williams Consulting, Inc.

**VISIONING FOR SUSTAINABILITY:** Working alongside the community and prioritizing equity while identifying goals and creating a vision for sustainability.





**WATCH:** [The Vision Test](#) (~4 minutes)

After watching the video, reflect on the following questions:

- How can we make sure our vision is **resilient**? Can our vision withstand cultural, political, or social change?
- How can we make sure our vision is **inclusive**? Does our vision invite all stakeholders to contribute?
- How can we make sure our vision is **service oriented**? Is our vision focused on meeting the highest needs and priorities of the children and families we want to serve?



Your vision is your dream; it's what the team believes are the ideal conditions for your community. It paints a picture of how programs and initiatives would look if they were fully sustained and meeting community needs. Consider the following steps to develop your vision statement:

- **CREATE A SHARED PURPOSE.** Having a common understanding about why sustainability is important and what needs to be sustained will keep the team motivated and on track. Use these guiding questions to help you get started:
  - What are we currently doing about the issue at hand? What are the core components of services and programs that must be sustained? What assets can we utilize to strengthen sustainability?
  - What's the challenge? What barriers are being faced in building more sustainable early childhood programming?
  - Why do we care? What are the impacts on children and families? On providers and community well-being?
  - What will success look like? How will we know we have achieved success?<sup>5</sup>



- **CONSIDER WHAT WORKS.** Think about the following common characteristics of effective vision statements and how they might apply.
  - Easily understood and shared by members of the community
  - Broad enough to include a diverse variety of local perspectives
  - Inspiring and uplifting to everyone involved
  - Brief and easy to communicate in just a few words<sup>6</sup>
- **EXPLORE OTHER VISION STATEMENTS.** Many teams find it useful and inspiring to examine words, phrases, and structures from other vision statements.
- **DRAFT AND SELECT A VISION STATEMENT.** Engaging in a group brainstorming session is a good way to get started. You may need to repeat this step several times before your team reaches a consensus.

## EXAMPLES OF VISION STATEMENTS

- To be one of the best states to raise a child.  
(*Michigan's Collective Early Childhood Action Plan*)
- All children are able to access high-quality services, education and out-of-school opportunities, and all parents and families can access the support they need to ensure their children get the best start in life possible.  
(*Michigan PDG B-5 grant*)
- Every child in every state has what they need in the early years to realize their full potential for a lifetime. (*Alliance for Early Success*)
- Every family in the United States has access to a high-quality, affordable child care system. The child care system supports children's growth, development and educational advancement and creates a positive economic impact for families and communities. (*Child Care Aware of America*)





# CREATE GOALS

Once a vision for sustainability is in place, the next step is to answer this question: What is the role of this team in ensuring programs are sustained—in short, WHAT are we going to do? Here the team will be engaged in laying out some concrete, outcome-oriented goals. Effective goals will (1) inform important community stakeholders and key beneficiaries of what you plan to do; (2) focus and motivate your team to commit to the work and understand what and how they can contribute; and (3) guide sustainability planning and decision-making by defining priorities and purpose.

**When developing goal statements, consider the following guiding questions:**

- What actions are we going to take to achieve our vision and ensure programs are sustained?
- Why is this goal important? Or what will be different when we have accomplished our goal?
- What skills or knowledge do we need to support this goal as part of sustainability efforts?

## VISION AND GOAL-SETTING TEMPLATE

Use the responses from the discussion questions to create vision and goal statements to inform sustainability efforts in your community.

Discussion Questions	Responses and Ideas
<b>What are we currently doing about it?</b> What are the core components of services and programs that must be sustained? What assets can we utilize to strengthen sustainability?	
<b>What's the challenge?</b> What barriers are being faced in building more sustainable early childhood programming?	
<b>Why do we care?</b> What are the impacts on children and families? On providers and community well-being?	
<b>What will success look like?</b> How will we know we have achieved success?	

**VISION STATEMENT:**

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If there are multiple goals, use the following template to develop a statement for each goal.

Discussion Questions	Responses and Ideas
What <b>actions</b> are we going to take to achieve our vision and ensure programs are sustained?	
Why is this goal <b>important</b> ? Or what will be different when we have accomplished our goal?	
What <b>skills or knowledge</b> do we need to support this goal as part of sustainability efforts?	

**GOAL STATEMENT(S):**



## EXPLORE

- [\*\*Beyond Sustainability to Resilience.\*\*](#) iLead Strategies and Community Action Partnership created this sustainability planning guide, which identifies six key elements including the creation of vision and mission statements. The guide includes a self-assessment tool for each of the elements (including vision and mission) along with tasks specific to each element. Users can rate themselves on a 5-point rating scale.
- [\*\*Creating Vision and Mission Statements.\*\*](#) This section of the Community Toolbox, Proclaiming Your Dream: Developing Vision and Mission Statements, includes a definition of vision and mission statements, discussion of why they are important, and guidelines for writing effective statements. The section also includes links to a PowerPoint presentation, examples of statements, and a planning worksheet.
- [\*\*The Hexagon: An Exploration Tool.\*\*](#) The National Implementation Research Network at the Frank Porter Graham Child Development Center, University of North Carolina at Chapel Hill, designed this tool to be used by a team to facilitate discussion and ensure diverse perspectives are represented in a discussion of the six contextual fit and feasibility indicators.



# STEP 2

## EXPLORE THE LEVERS





# PROGRAM MANAGEMENT

**“The only constant, as the saying goes, is change. To survive and thrive amidst changes, [programs] must change the way they operate.”**

– MEGAN COOLIDGE<sup>8</sup>

## WHY THIS MATTERS

Sustaining programs often relies on two key factors: **(1) having strong internal systems** and **(2) being able to adapt to changing conditions**.

We know that the most sustainable programs are often those that are able to maintain strong internal systems. This is seen in ...

- how the program is managed;
- the procedures and practices that are implemented;
- quality standards and correlating supports;
- data collection, community engagement, and other partnerships; and
- human resources management.

We also know that change is inevitable, and now more than ever, organizations, programs, and efforts around the world are continuously adapting to changing conditions. Early childhood system leaders can strengthen their programs and ensure their sustainability by being proactive rather than reactive to change. This often involves critical analysis of the broader early childhood landscape to ensure risks are foreseen and assets are leveraged to maximize opportunities in programs. Early childhood leaders must also stay connected to young children, families, and providers so that they can be responsive to any new directions or agendas that may be required and can continuously meet community need.



## STRATEGIES TO CONSIDER FOR SUSTAINABILITY PLANNING

- **DEVELOP STRONG INTERNAL SYSTEMS:** Have strong internal processes within the organization that ensure a vibrant, durable, and continuously improving program/organization.
- **BE ADAPTIVE TO CHANGING CONDITIONS:** Develop the capacity to respond and adjust to changing economic, fiscal, political, and cultural conditions that affect the success of the initiative.



Being able to simultaneously build strong internal systems as the foundation to the program and to be flexible in the program's implementation are both critical to success. While many factors make a sustainable program, these core components of internal systems are key to making a program run smoothly over the long term and are additionally areas where adaptability is essential:<sup>9</sup>

- **Operations data orientation in operations and decision-making:** Degree to which data is used in program and relationship management, administration, and decision-making
- **Efficiency of operations:** Process- and cost-efficiency of service delivery relative to norms in the agency's field of work
- **Quality control systems:** Service quality performance and, where applicable, system evaluation relative to standards in agency's field
- **Client-centricity of service delivery:** Degree of client focus and input into service design
- **Training investment level:** Percentage of the annual operating budget dedicated to staff training
- **Involvement in advocacy/systemic change activities:** Engagement in advocacy activities, demonstrated through strategic goals and annual budget commitment



**READ:** [Adaptive Leadership: Reconceptualizing the Challenges Faced by our Field](#)

**After reading the article, reflect on the following questions:**

- Reflect on the top three challenges your program is facing. What are some internal systems that can be adjusted to help solve these issues?
- How, as a leader, can you ensure any potential solutions are grounded in the ongoing needs of those your program serves?



*Adapted from FSG's "Guide to Trend Mapping"*<sup>10</sup>

A trend map is a visual depiction of relevant trends influencing the system around a given topic—in this case, sustainability. Developing a trend map can help a team deepen their understanding of sustainability by identifying changing conditions that programs are experiencing and the corollary internal systems that can be strengthened.

**FACILITATING TREND MAPPING FOR SUSTAINABILITY**

Trend mapping for sustainability will take approximately 60-90 minutes to facilitate. Facilitators will want to ground themselves in the program’s sustainability challenges or goals and gather a representative body of team members to participate in the activity.

**Materials needed:**

A large sheet of paper, a whiteboard, or a digital collaborative platform; tape; markers; sticky notes (at least two colors); and other materials to write with.



**TREND MAPPING FOR SUSTAINABILITY**

To complete the mapping activity, follow the steps listed here.

**HOW CAN TREND MAPPING SUPPORT SUSTAINABILITY?**

- Understand the landscape/context and history related to sustainability.
- Identify how various contextual factors (e.g., social, political, cultural, and economic developments and events) are changing and influence goals for sustainability.
- Explore relationships, momentum, and energy among the trends on the map (e.g., increases, decreases, appearances, disappearances, evolutions, and adaptations).
- Understand how the capacity of internal systems can be strengthened to build on assets and leverage opportunities for more sustainable programs and services.

**IDENTIFYING AND MAPPING CHANGING CONDITIONS**

<b>1. Grounding</b>	<p><b>Consider the intent of mapping.</b> What are we hoping to get out of mapping changing conditions?</p> <p>You will convene participants and share the process for participation in this mapping process. This is the time to share any concerns related to the program’s sustainability so that all participants have a shared understanding about both the process and what sustainability means.</p> <p>Participants might say: “We need to show our program’s effectiveness.”</p>
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## IDENTIFYING AND MAPPING CHANGING CONDITIONS

<p><b>2. Brainstorm</b></p>	<p><b>Consider all the trends that influence sustainability.</b> What things are increasing/decreasing or appearing/disappearing related to sustainability?</p> <p>Participants can share any relevant data and research related to the trends. Participants might say: “We are serving 278 families, and here are the changes in enrollment from the past three years.”</p> <p>You should now ask participants to write down all of the internal and external trends that impact the program’s sustainability. This can be done individually or in small groups.</p> <p><b>TIP:</b> Encourage participants to list at least 10 trends.</p> <p>Participants might say: “There is a projected loss in funding for 2023, there is increased demand for our program, and a key state-level policy is changing.”</p>
<p><b>3. Co-create the Map</b></p>	<p><b>Determine whether the trends support or impede progress toward sustainability.</b> You can group related trends as you go.</p> <p>First, invite a participant to share one of the trends on their list and to identify whether the trend is “supporting” or “impeding” progress toward sustainability. Write the trend on a sticky note (green for supporting trend, red for impeding trend) and place it at the center of the map. Then, invite someone else to share another trend influencing the topic and whether it is supporting or impeding progress. Before placing the sticky note on the map, ask the participant whether the trend he or she has just named is related to the first trend. If so, place the new sticky note near the first one; if not, place the sticky note on its own in another spot. Continue this process for the remainder of the time allocated to this part of the exercise, or until all the trends are mapped. At the end of this part of the session, you should see multiple clusters of trends laid out around the topic at the center of the page.</p> <p><b>TIP:</b> This can be done with sticky notes and posters or on a whiteboard.</p>
<p><b>4. Identify Assets and Opportunities</b></p>	<p><b>Explore solutions.</b> Now participants can begin to identify where there is energy in the system either supporting the program or potentially impeding the program.</p> <p>You will now have participants reflect on what they are seeing and share new insights or any implications for the program’s work. What is most exciting about this map? What appears to be a central issue or key problem for us?</p>



## IDENTIFYING AND MAPPING CHANGING CONDITIONS

	<p><b>TIP:</b> This part of the process helps transition the group from analysis of the landscape toward finding solutions, focusing on internal systems and program capacity.</p>
<p><b>5. Consider Internal Systems and Capacity</b></p>	<p><b>Identify aspects of internal systems that can be adapted.</b> Participants are now ready to consider the internal systems and capacity of the program to address the assets and opportunities.</p> <p>You should now ask participants, “Given what we are seeing, what internal systems or capacity needs should we address?” This is the opportunity for the participants to focus on the opportunities to strengthen the program in service of sustainability.</p> <p>Participants might say: “We need to add staff to address the change in policy.”</p>
<p><b>6. Prioritize Opportunities</b></p>	<p><b>Prioritize next steps and actions.</b> What will we do first?</p> <p>You should now have a list of program-strengthening opportunities that can be prioritized. With this list, decision-makers should be able to determine what next steps can be taken toward the program’s sustainability goals and can ultimately be included as part of the overarching sustainability plan.</p>





## EXPLORE

- **Systems Thinking Toolkit:** A toolkit from the social change organization FSG provides several tools to support systems thinking and practice. These tools and correlating resources can aid in conversations about complex relationships and the context surrounding programs.
- **Program Sustainability Assessment Tool:** This resource supports stakeholders in understanding all of the factors that contribute to program sustainability. With knowledge of these critical factors, stakeholders can build program capacity for sustainability and position their efforts for long-term success. This self-assessment tool allows programs to assess their current capacity for sustainability across a range of specific organizational and contextual factors.
- **Organizational Sustainability:** Management Advisory Services (MAS) created this webinar that provides ideas and tools for leaders to build a sustainable organization that can endure times of crisis. This webinar provides tools and resources on ensuring organizational sustainability through moments of crisis, especially in the context of the COVID-19 pandemic. This webinar focuses on agility planning, management during times of stress, and the importance of digital transformation.
- **PDG B-5: Project Management Tools:** This document from the PDG B-5 Technical Assistance (TA) Center provides a breakdown of some of the project management tools available, along with brief descriptions for each. For a project to meet its goals, stay on budget, and adhere to deadlines, there must be a strong plan in place for project activity management and accountability. Project managers must track outcomes and deliverables, be aware of potential risks to project performance, and ensure appropriate staffing and resources are available to fulfill the project needs.
- **MAPP–Mobilizing for Action through Planning and Partnerships:** This resource from the Community Toolbox focuses on MAPP—a process that improves systems and mobilizes partnerships. This is a participatory process guided by a community-generated vision; strategies and goals based on an assessment of the community’s priorities and needs; an action plan that grows from the vision and the goals; and evaluations of the process itself and of the implementation and results of the action plan, with an eye toward improving effectiveness in the community as it’s maintained over time.



# DATA AND EVALUATION

**“Unlike the for-profit sector, where the metrics are straightforward and focused on profit, the social sector reports to many—the community being served, staff, donors, and policymakers. Nonprofits must be able not just to show what they do, but also to demonstrate the impact of what they do in terms of multiple bottom lines.”**

– JIM FRUCHTERMAN<sup>11</sup>

## WHY THIS MATTERS

The use of data supports programs in a variety of ways. From making informed decisions to solving challenges, data measures programs’ effectiveness and the opportunities to refine their approach toward greater impact. As programs consider sustainability, they must consider what data they have access to, what new types of data could be used, and how it can be leveraged to show impact. Specific types of data that support sustainability might include data that demonstrates program efficiencies and effectiveness, community support, funding diversification, collaborative partnerships that can maximize resources, returns on investment, and the attraction of new investments and resources. Establishing, tracking, and utilizing such measures will help programs monitor their own performance and progress toward their outcomes.

### STRATEGIES TO CONSIDER FOR SUSTAINABILITY PLANNING

- **FOCUS ON RESULTS:** Incorporate processes to establish, track, and utilize outcome measures. Programs use information to improve work. Develop and maintain robust data systems to monitor internal organizational performance and progress toward desired outcomes.

## WEBINAR SERIES

WATCH THE WEBINAR [HERE](#)



KATE STEBER



CHRISHANA LLOYD

**FEATURING:** Kate Steber M.S.W., M.P.H., Research Scientist in Early Childhood Development research at Child Trends, and Chrishana M. Lloyd, Ph.D., LICSW, Research Scholar in Early Childhood Development research at Child Trends

**DATA AND EVALUATION:** Using data and evaluation to support sustainability



By focusing on results, programs may ask themselves questions such as these:

- Are we doing what we planned?
- Are we making the impact that we hoped to make?
- What is working well? What could work better?
- Are all key players acting effectively in their roles?

In order to answer these questions, programs need to consider how they will measure success:

- What type of data do we need?
- What data do we currently have access to?
- Are we observing measurable characteristics?
- How will we collect the data needed?
- Do we have the capacity to make data-driven decisions?

## TYPES OF DATA

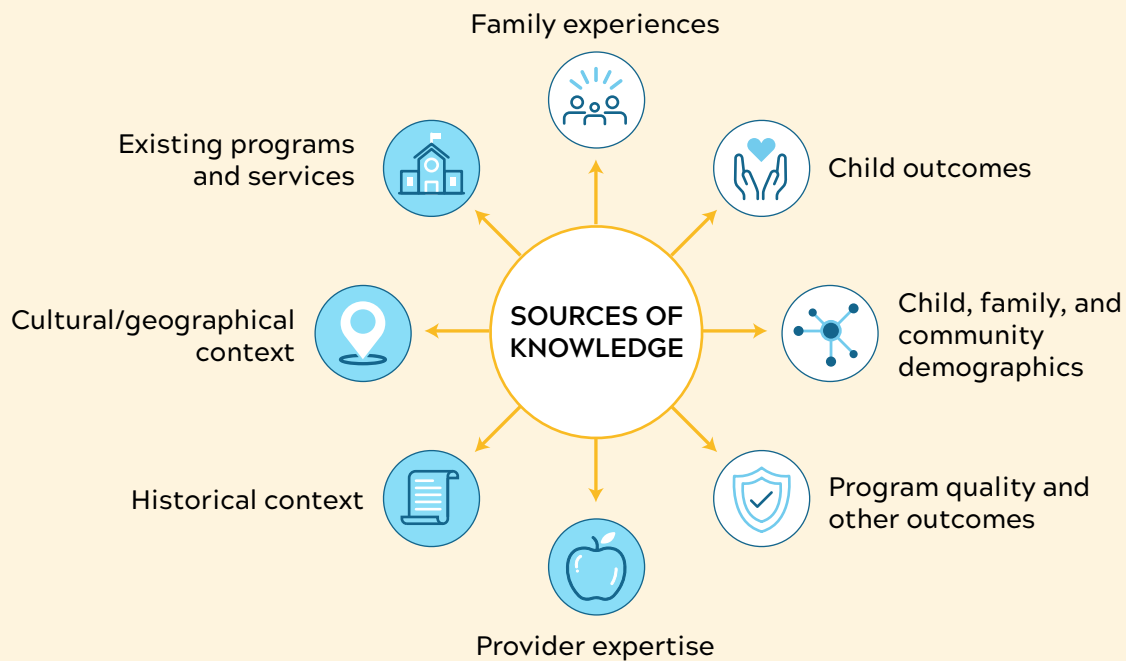
Use of both qualitative and quantitative data is important for sustainability. Quantitative data will give programs the numbers to support their strategies and actions, while qualitative data provides the details that give programs a more complete picture of the “why” and “how.” For example, data can be used to define and describe why a given issue is important to healthy weight and how it impacts child well-being. When both type of data are used together, programs have a more robust picture of what is happening in communities and why. This ability to frame the issue is particularly important as programs drive messaging about their efforts and impact. Seeking and utilizing both quantitative and qualitative data also facilitate connections to community, by hearing directly from those most impacted by their services. The better data programs have, the more effectively they can articulate their story of outcomes and impact on communities.

**QUALITATIVE DATA:** Qualitative data is **information that cannot be counted, measured, or easily expressed using numbers**. It is collected from text, audio, and images and shared through data visualization tools, such as word clouds, concept maps, graph databases, timelines, and infographics.<sup>12</sup>

**QUANTITATIVE DATA:** Quantitative data is **data expressing a certain quantity, amount, or range**. Usually, there are measurement units associated with the data—for example, feet in data about people’s height.<sup>13</sup>

Ultimately, data is **ALL** the knowledge, quantitative and qualitative, that we use to make decisions.

## A CLOSER LOOK AT DATA



**CHILD OUTCOMES:** What is the well-being of children? To what degree are children benefiting from services?

**CHILD FAMILY AND COMMUNITY DEMOGRAPHICS:** Who are the children and families in our communities, and what are their characteristics that impact their experience interacting with early care and education, and related systems?

**PROGRAM QUALITY AND OTHER OUTCOMES:** How effective and consistent are the programs and services that exist and that are available to children?

**PROVIDER EXPERTISE/PERSPECTIVES:** What do providers see as the key assets and barriers?

**HISTORICAL CONTEXT:** What has happened in the past? Why are things the way they are? What strategies/initiatives have occurred/are occurring, and what is the impact?

**CULTURAL/GEOGRAPHICAL CONTEXT:** What are the unique factors related to the cultural experience or geographic location of the community?

**EXISTING PROGRAMS AND SERVICES:** What programs and services exist, and how accessible are they?

**FAMILY EXPERIENCES:** How do families experience the system and the programs they interact with? What is most important to them?





## ENSURING EQUITY IN DATA

As programs are identifying and using data to tell their story of impact, there is an opportunity to consider how equity shows up. Without both access to quality data and an equity lens, it won't be possible for programs to understand where efforts should be targeted and how to evaluate the impact on communities. The National Equity Project uses the metaphor of a lens to describe “the possibility of seeing our contexts in new and revealing ways.”<sup>14</sup> The glasses we wear impact what we see, just as we might wear different glasses to read the newspaper, to drive at night, or to look at a computer screen. This compares to our perspective when we look at data: we must put on an intentional pair of “glasses” to focus on equity as we gather, analyze, and take action on data so that we can tell the most authentic and inclusive stories of the communities involved.

Programs can embed an equity lens in their work and their data in a myriad of ways; approaches should be tailored to the needs of communities served. Successfully ensuring equity in data can look like the following:

- **Having positive, strengths-based framing of data that moves from a deficit model to an actionable platform to design a data story.** For example, data can be reframed with “bright spots” to develop data stories that spur program changes to promote child well-being.
- **Using participatory, community-engaged, and iterative processes to refine the data to frame the research in ways that move the dial toward programmatic and policy solutions and systems-level change.** For example, host listening sessions with community residents and leaders to hear what matters most to those most impacted by a program's services.
- **Considering how systemic inequity impacts the program, its staff, and the communities they serve by acknowledging the policies, structures, and norms that have led to inequities while also improving what is in the program's power to change.** For example, programs might utilize a racial equity impact analysis assessment or other dedicated time for reflection and discussion about racial equity and have clear practices for acting on equity issues within their control.



## THINK

### READ: [Using Data for Action and Impact](#)

After reading the resource, reflect on the following questions:

- Considering your position in the “data supply chain,” who drives decisions in your program about data? Does this data help your program be accountable to the communities you serve?
- How does your program answer the question, “How much did it matter?” What kinds of qualitative data are collected to show impact?



## DO

## CONNECTING DATA AND OUTCOMES

How can programs demonstrate that they are making an impact on communities? One way is to consider the connection between data and program outcomes.

Data helps programs tell the story of their work. When programs connect their data to their outcomes, it enables them to refine strategies toward greater efficacy and efficiency. Simultaneously, these connections can support storytelling to ensure that the broader sector, community, and funders understand your impact. There is no one-size-fits-all process or solution to solving challenges with accessing and utilizing data; however, using the following discussion questions will provide programs with opportunities for meaningful discussion toward positive outcomes and meaningful impact.



# DATA AND OUTCOMES TEMPLATE

Use the discussion prompts on the left side of the template as a discussion guide. Start by documenting your outcomes along the top row, then fill in the additional information as you move through the questions.

DISCUSSION QUESTIONS	RESPONSES AND IDEAS		
	OUTCOME 1	OUTCOME 2	OUTCOME 3
<b>IDENTIFYING OUTCOMES</b> What do you hope happens as a result of your program? What are the benefits to the participants?			
<b>COLLECTING DATA</b> What data does your program have access to?			
<b>MAKING MEANING</b> What does this data tell us? Are we making a difference?			
<b>APPLYING TO SUSTAINABILITY</b> How can this information be used to support our sustainability efforts?			



## EXPLORE

- [The Results-Based Accountability Guide](#): This guide from Clear Impact walks programs through the process of using results-based accountability (RBA) as a step-by-step process. RBA improves the lives of children, families, and communities and the performance of programs by getting from talking to action quickly; being a simple, commonsense process that everyone can understand; helping groups to surface and challenge assumptions that can be barriers to innovation; building collaboration and consensus; and using data and transparency to ensure accountability for both the well-being of children, families, and communities and the performance of programs.
- [Data Visualization and Health Equity Best Practices Checklist](#): Developed by the Bureau of Family Health Data to Action Team, this checklist aims to help health equity advocates, practitioners, and partners guide the development of communication materials that can present equity-related data in a responsible, reflective, and representative manner.
- [Selected Tips for Collecting, Reporting, and Using Data in Early Childhood Care and Education](#): This tip sheet from the PDG-B5 TA Center has practical examples for programs on improving the accuracy and usefulness of the data collected, data reporting, and strengthening a culture of data.
- [Data Storytelling](#): This article helps programs identify how to use the data story methodology and effectively use data in ways that bring attention to inequities. This article culminates in a list of useful resources and tools to build a deeper understanding of data stories, different types of narratives, interactive data tools, and strategies for communicating with diverse stakeholders and policymakers.

## FUNDING AND PARTNERSHIPS

**“If we don’t say out loud that this should continue, this is how much it should cost, and this is what we want moving forward, then we don’t have the information we need for sustainability.”**

– STEPHANIE HOGENSON<sup>15</sup>

## WHY THIS MATTERS

Sustainability requires efforts focused on identifying and securing needed resources—both financial and human. Developing financing strategies and securing funds while at the same time establishing key partnerships to leverage available resources will build momentum and capacity and increase efficiencies. In addition, engaging key champions who can carry your message and expand buy-in and commitment must go hand in hand with funding efforts.



In connection with financing, sustainability is not just about finding new funding as the current funding ends but is a thoughtful process of building support along the way. As a result, resources are available when needed, and funding is stabilized at the level needed to maintain ongoing service delivery. It is important to start with a clear understanding of program costs, how funding is generated and used to achieve desired outcomes, and the mix of financing strategies and funding sources to be leveraged. Diversified funding is considered a cornerstone to achieving sustainability. This can include securing direct funding through grants from government programs and private sources as well as establishing strategic partnerships designed to leverage resources, for example, through sharing costs for services with other agencies.

## STRATEGIES TO CONSIDER FOR SUSTAINABILITY PLANNING

- **DEVELOP A FINANCING STRATEGY:** Identifying a variety of financing strategies that could support the program and developing and following a plan to pursue those strategies.
- **ENGAGE KEY CHAMPIONS:** Identifying potential champions needed to approach on an individual level and following a plan to do so.

Initiatives that also successfully obtain support from key champions are more likely to be sustained. It is 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. Successful champions commit to the work, engage others, communicate effectively, build organizational capacity, plan and implement the work, and address challenges. Multidisciplinary champions and champions within different hierarchical levels of an organization are also vital to sustaining the work, as their roles are often cross-cutting. Strengthening or maintaining champion and other leadership roles is important for empowering those individuals to create connections and take action to sustain the work.<sup>16</sup> In short, combining strategic partnerships and financial resources is the key to sustaining important programs and initiatives.

## WEBINAR SERIES

WATCH THE WEBINAR [HERE](#)



**FEATURING:** Ruth LaToison Ifill, M.S., co-founder and Managing Partner of Aridai Management Consulting Firm, and the President & CEO of the Washington Regional Association of Grantmakers

**RESOURCES AND PARTNERSHIPS:** Exploring best practices for establishing and maintaining partnerships.



## THINK

### **READ:** [Strategies for Sustaining the Initiative](#)

**After reading this resource, reflect on the following questions:**

- What tactics or strategies have we used to secure resources—both financial resources and partnerships? What tactics or strategies might we consider using in the future?
- Who are the important stakeholders/beneficiaries of services who should be engaged in identifying financing strategies and partner outreach?
- What considerations for local conditions and the needs of children and families of color should be made as we identify funding and partnership strategies?



## DO

### **Implement strategies for effective financial resource and partnership development**

Developing strategies and action steps for securing needed resources through funding and partnerships—including identifying and engaging key champions for your efforts—is a cornerstone of ensuring long-term sustainability.

# RESOURCE PLANNING TOOL <sup>17</sup>

To use this tool, consider each of the steps on the left, and document your responses as you go.

FINANCING	
<b>STEP 1: Estimate fiscal resources needed</b>	
What will it cost to sustain this program/initiative?	
<b>STEP 2: Map current resources that support the program/initiative</b>	
What resources are currently available and being used?	
<b>STEP 3: Identify funding gaps</b>	
What is the difference between what is available and what is needed to sustain the program/initiative?	
<b>STEP 4: Identify options for leveraging current resources</b>	
How can we ensure efficient use of existing funds?	
What are the options for reallocating or redirecting existing funds?	
How can we increase the flexibility of existing funding streams?	
Are there low-cost or no-cost opportunities we could pursue?	
<b>STEP 5: Identify options for leveraging current resources</b>	
Do any existing partners have funding that could support our work?	
What public-private partnerships could we establish?	
What funding streams are available through the state or local community?	
Are there grant opportunities we could pursue?	



## ENGAGING CHAMPIONS

### STEP 1: Identify potential champions

Who has a shared interest in or deep commitment to this work?

Who can help us make needed connections?

### STEP 2: Conduct outreach

Who on our team is best suited to reach out and establish relationships?

What outreach strategies should we utilize?

What are the targeted messages we need to develop to reach potential champions?

### STEP 3: Build a cadre of champions over time

What ongoing community connections should we maintain?

What outreach strategies should we utilize?

How should we recognize the contributions made by champions?

Source: Adapted from Jakopic, J. (2012). [\*Sustainability assessment tool\*](#).



## EXPLORE

- **Strategies for Financial Sustainability:** This section of the Community Tool Box informs efforts focused on funding and financing for sustainability. It includes a step-by-step guide to developing a financing plan, worksheets, and links to resources.
- **Promoting Adoption of the Initiative's Mission and Objectives:** This section of the Community Tool Box addresses the importance of getting buy-in and cultivating partners who can help advance a program's goals and objections. It includes an extensive list of strategies for informing and engaging key stakeholders.

- **[Early Childhood Finance Toolkit](#)**: This curated resource from the PDG B-5 TA Center shares how creating and sustaining a coordinated early childhood system requires a focus on sustainable financing. This toolkit, designed with state early childhood leaders in mind, is a collection of tools, guidance, and resources that can be used by those who are being introduced to different aspects of financing as well as those with more financing experience.
- **[Financing Prenatal to Three Services–Local Approaches](#)**: This report, co-authored by the Center for Law and Social Policy (CLASP), National Collaborative for Infants and Toddlers (NCIT), and Early Learning Policy Group profiles a group of communities across the country that have made tangible progress in creating new local prenatal-to-three financing solutions, using different strategies.



## STORYTELLING

**“For many organizations, ‘story is currency.’ It is what moves donors and volunteers to join the cause. The balance of making these stories ones that have actionable impact while also preserving the integrity, wholeness, and power of the communities served is a constant struggle for many.”**

**– DANIELLE DAVIS, LIBERATED DEVELOPMENT<sup>18</sup>**

# WHY THIS MATTERS

Cognitive psychologist Jerome Bruner suggests we are 22 times more likely to remember a fact when it has been wrapped in a story.<sup>19</sup> Storytelling activates parts of the brain that cause a listener to turn the story into their own idea and experience, which helps us to begin to fully embrace it. In this way, storytelling and effective communication can be an important component of sustainability. Communication builds sustainability by identifying opportunities and ensuring that stakeholders are aware of the program and its importance. When programs communicate who they are and what they do effectively, they will garner a broad base of support by having messages and messengers to drive their mission and vision. In order to be effective communicators, programs can use storytelling to share the successes and opportunities of their work.

## STRATEGIES TO CONSIDER FOR SUSTAINABILITY PLANNING

- **GARNER A BROAD BASE OF SUPPORT:** Take steps to involve the community in their work and gain community support based on the program's positive impact. Vital support may come from multiple groups and individuals, including leaders, partners, coalitions, advocates, stakeholder groups, and the public.

Nonprofit organizations are continually trying to figure out ways to **(1) sustain and support their work over the long term** and **(2) improve and demonstrate their impacts in effective ways**. Storytelling is a way that organizations can do both.

Organizations that have a robust, intentional storytelling culture help to cyclically preserve and reinforce their mission and impacts in society.<sup>20</sup> Storytelling becomes a way forward for organizational sustainability because the approach helps to grow the organizational legacy within the sector and broader community and preserves impacts over time. Whether your program is new to storytelling or already uses stories as a communications tool, there is an opportunity to refine your efforts and reframe storytelling as a core strategy of the organization.

Successful organizations use storytelling to support sustainability in the following ways:<sup>21</sup>

- Develop a clear strategy for stories across the program's functions.
- Develop a process for story collection that includes staff training on storytelling, story circles, and a storytelling audit.
- Define the purpose and expected outcomes for your stories—considering what, how, why, and for what audience.
- Engage internal and external parties as storytellers.
- Monitor and evaluate the use of stories.



# WEBINAR SERIES

WATCH THE WEBINAR [HERE](#)



**FEATURING:** Lorena Gomez-Barris, MNA, Director of Administration for the Kenneth Rainin Foundation

**STORYTELLING FOR SUSTAINABILITY:** Providing tools and resources for using storytelling and communication to build public support and sustainability.



## THINK

**LISTEN:** [How Can We Tell Stories of Systems Change That Are More Reflective of the Way Change Happens?](#)

After listening to this webinar, reflect on the following questions:

- How can you revitalize your communication and storytelling efforts to center the voices farthest from access to power and decision-making roles?
- What opportunities exist to move communication and storytelling strategies from transactional to transformational?



## DO

**Assess your program for storytelling practices**

This assessment, adapted from Lorena Gomez-Barris's research on storytelling for organizational impact,<sup>22</sup> will identify where your organization is in terms of storytelling practices and potential areas for improvement. If you are interested in learning more about storytelling practices and how they support sustainability, you can explore Lorena's research [here](#).

# ORGANIZATIONAL STORYTELLING ASSESSMENT TOOL

To use this tool, consider the metrics along the left and note whether it is true for your program “never,” “sometimes,” or “always.” Then reflect on the questions at the end to help determine what actions you can take.

	NEVER	SOMETIMES	ALWAYS
<b>STORYTELLING CULTURE</b>			
Does the organization value storytelling and support its use throughout the organization? How is that apparent or not apparent?			
Does leadership take an active role in supporting storytelling throughout the organization?			
Is story collection and integration part of the organizational communications strategy?			
Do staff feel confident in their abilities to share stories?			
Does the organization provide training on storytelling?			
Are stories in alignment with the mission, and do they create a cohesive picture of the organization’s overarching narrative?			
<b>FUNDING FOR STORIES</b>			
Is there a dedicated amount within the annual communications budget for producing stories?			
Are stories being regularly shared with funders and other stakeholders who donate to the organization?			
<b>COLLECTING AND ARCHIVING STORIES</b>			
Does your organization utilize an organized system for storing storytelling assets (videos, photos, blogs, newsletters, social media posts, etc.) that is easily accessible to all staff?			
Are the impacts of storytelling evaluated throughout the organization?			

## NOW REFLECT

What does this assessment tell us about our storytelling efforts?

What should be our next steps that can inform our sustainability plan?



## EXPLORE

- **Promoting Adoption of the Initiative's Mission and Objectives:** This section of the Community Toolbox focuses on what your initiative can gain by promoting your mission and objectives, and how you can do so effectively. Threaded with examples, this resource can help programs determine who their target audiences are and how to connect them to the program's mission and objectives.
- **A Sustainability Planning Guide for Healthy Communities:** Beginning on page 79, this resource from the Centers for Disease Control and Prevention (CDC) shares communication strategies for sustainability. This resource is helpful for programs considering the multiple forms of communications internally and externally that drive their work. This document also includes considerations for communicating with decision-makers about policy and working with media.
- **Champion Checklist—How Can We Influence Others to Support a Cause?:** This simple tool from The Giving Practice shares an eight-step process for determining whom to connect with, using those connections to influence others, and connecting to emotions.
- **Ethical Storytelling Webinar:** This hour-long webinar provides a look at the concept of ethical storytelling, which focuses on how to use storytelling in ways that more justly capture young children and families. This webinar helps programs answer questions such as these: How do we tell stories that honor young children and families without exploitation? What blind spots can we uncover to better highlight the strengths of our communities? How can we share the stories of organizational impact in equitable ways?
- **Resource List—Why Storytelling Works:** This list of resources is focused on the science of storytelling. Programs can use this list to support their understanding of how storytelling impacts the brain and why it matters. These resources can help hone messages and help programs tell effective stories.
- **Blueprint for Belonging Curriculum:** The Blueprint for Belonging (B4B) network has published this curriculum on strategic narrative to support the political development of staff and grassroots leaders. The curriculum comprises modules designed to build the capacity of people in the social justice movement to analyze and strategize using the B4B framework for the strategic narrative.



# STEP 3

## CREATE AND MONITOR THE PLAN





# WHY THIS MATTERS

**“Make sustainability planning as tangible as implementation planning.”**

– OFFICE OF POPULATION AFFAIRS<sup>23</sup>

## CREATE THE PLAN

Creating the actual plan is a critical part of the overall process to guide and advance sustainability efforts in your community. Walking through the activities in this toolkit to decide on a vision, identify goals, and explore each of the levers provides a way to prioritize strategies, specific actions, and key measures that will inform your plan.

Once a draft plan is developed, share the plan with families, providers, and the community for additional feedback. Sharing a draft plan with the community can generate greater community buy-in, spark additional ideas and strategies that may not have been initially considered, and provide space for deeper reflection and consideration of unintended consequences. Providing multiple opportunities and methods for feedback is important to ensure that community members who are interested in providing feedback can do so and that feedback is gathered from a wide range of voices—not just those who are usually engaged or the “loudest in the room.” Once the plan is finalized, make it publicly available and consider how to engage the community in providing feedback on ongoing implementation efforts as the plan gets underway.

## IMPLEMENT AND MONITOR THE PLAN

Implementation means putting your plan into action. Once your plan has been launched and activities get underway, it is important to have **ongoing** ways to assess progress and whether or not your strategies are having the desired impact—and if not, to provide the opportunity to change course. Evaluating the progress and impact of your plan is important not only in determining its overall success in achieving its goals in the present, but in planning for the future. Monitoring can help make the case for shifts in decision-making and action, encourage continued participation by stakeholders, and garner overall support for efforts going forward.



## STRATEGIES TO CONSIDER FOR SUSTAINABILITY PLANNING

- **DEVELOP A SUSTAINABILITY PLAN:** Set priorities and identify action steps and measures of success to create an effective plan.
- **TRACK SUCCESS:** Monitor implementation of the sustainability plan in cooperation with your collaborators and partners to document and communicate your sustainability successes.



## THINK

### **WATCH:** The Intersection, [Racial Equity Impact Analysis Tool](#)

Consider conducting a racial equity impact analysis (REIA) as part of your planning process. An REIA is a method for assessing how different racial and ethnic groups are likely to be impacted by a proposed decision, plan, or action.

#### **After watching the video, reflect on the following questions:**

- How could you integrate an REIA into your sustainability planning process?
- Who would be the most important stakeholders to engage in the planning process to ensure you are including those most affected by the program?
- What will you do if you identify adverse consequences of proposed actions on different racial groups?



## DO

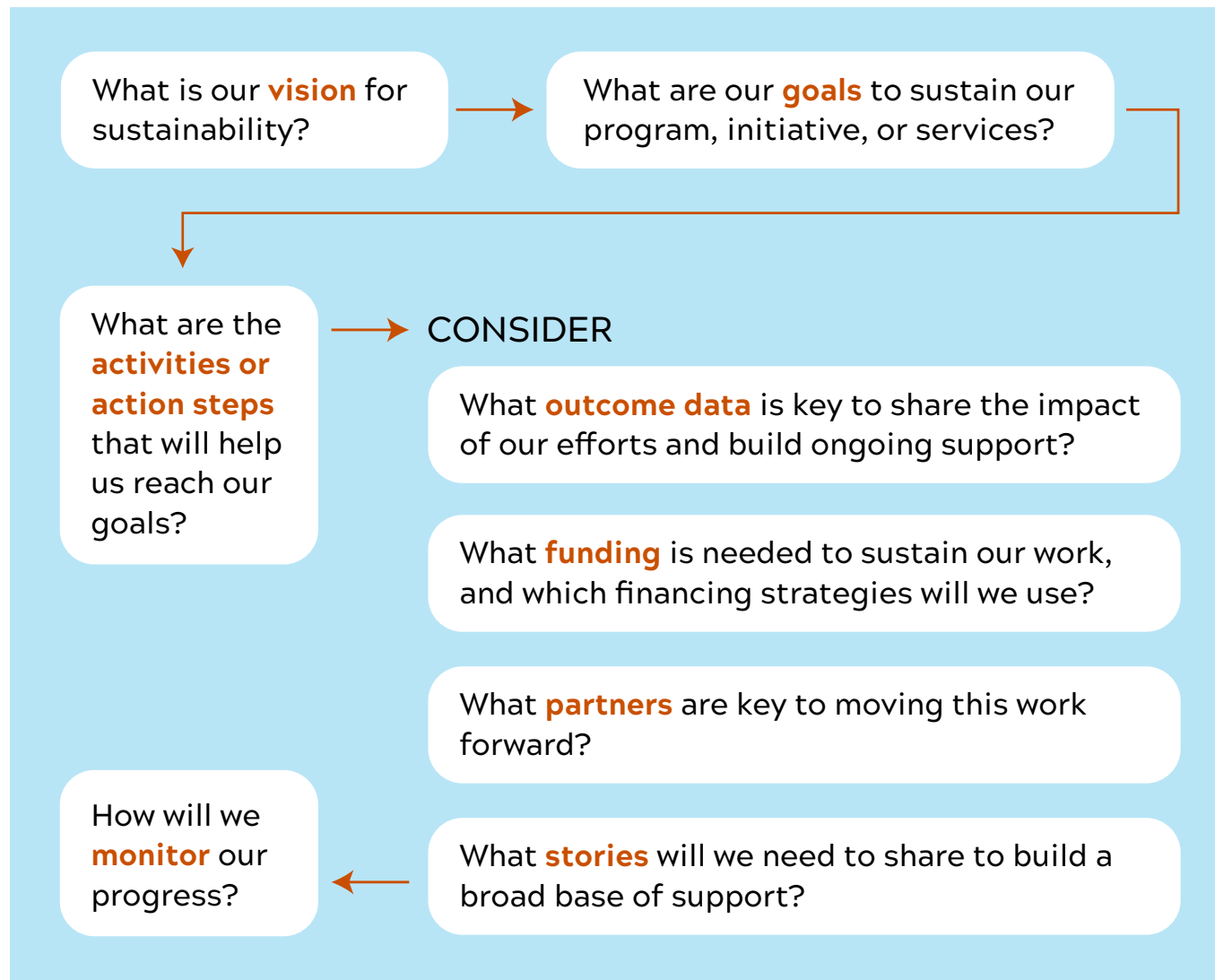
### **Develop and monitor a sustainability plan.**

The final sustainability plan should include a careful explanation of the goals and purpose of what is being sustained, an evaluation of the current context and criteria that informed decision-making, identification of options considered and selected engagement with stakeholders, and an ongoing mechanism for reviewing progress on implementation and making plan modifications as needed.<sup>24</sup>



# STEP 1: DEVELOP A PLAN

Use the following template to develop your sustainability plan.



## STEP 2: MONITOR THE PLAN

Monitoring and evaluating the planning activities and status of implementation of the plan is as important as identifying strategic issues and goals. A SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis is a useful tool for assessing how your sustainability plan is working and informing changes or adjustments that could be made to help you implement strategies. Use the following table to assess your plan using a SWOT analysis.



### STRENGTHS

- What elements of our plan are working well?
- How does our plan align to our vision?

### WEAKNESSES

- What elements of our plan are not working well?
- Who is not engaged in our efforts but should be?

### OPPORTUNITIES

- What new or untapped funding or community resources can we add to our financing plan?
- Who are the emerging leaders and trusted community members we can enlist to support our plan?

### THREATS

- How did we take other community needs that might be competing for limited resources into account in our plan?
- Who might be opposed to our plan, and how can we get them involved?

Based on your findings using the SWOT process, update and revise your sustainability plan to better meet your capacity, resources, and local context. This means you may only need to make minor adjustments to the plan, or you may decide to revisit your program's strategic plan and consider entirely new strategies. A sustainability plan is a living document that should be responsive to the current challenges and opportunities present for your program so that leaders can make the best decisions for the health of the program and can plan for the future.



## EXPLORE

- **[Sustainability Planning Tools](#)**: This facilitation guide from the Wallace Foundation provides an overview of three sustainability planning tools—Self-Assessment, Strategy Development, and Action Plan. This guide provides helpful tips for preparing for and facilitating a collaborative planning process using the three tools.
- **[A Sustainability Planning Guide for Healthy Communities](#)**: The Sustainability Planning Guide authored by the CDC is a synthesis of science- and practice-based evidence designed to help coalitions, community-based organizations, and other community stakeholders develop, implement, and evaluate a successful sustainability plan. This guide provides a 10-step process for sustaining policy strategies and related activities, introduces various approaches to sustainability, and demonstrates sustainability planning in action with real-life examples.
- **[Resource Guide for Building Sustainable Programs](#)**: This guide from the Office of Population Affairs includes practical tips and activities that will help users develop a long-term sustainability plan. Eight sustainability factors are identified and accompanied by activities to assist users in developing sustainability plans. There is also a sustainability assessment tool with instructions for scoring included as an appendix.



# CONCLUSION

**“ When you connect sustainability to outcomes rather than to money, the importance of high-quality program planning comes sharply into focus. Programs that are planned with a commitment to continuing impact and that are implemented with a commitment to the touchstones of sustainability have huge advantages. They are more likely to bring ongoing value. ”**

**- BARBARA FLOERSCH<sup>25</sup>**

While sustainability may mean different things to different people, at the end of the day it is about creating the conditions and opportunities needed for long-term impact and change. This toolkit, while it was developed specifically to support efforts to sustain important programs and initiatives implemented through the Michigan PDG B-5 grant, looks beyond the need to just secure resources and funding. The toolkit provides a more holistic approach to what it takes to fully and solidly anchor programs in communities. It identifies key levers for sustainability and provides you with a comprehensive set of resources and tools grounded in research and best practice. It is our hope that communities, planning teams, agencies, and committed individuals will be able to use this toolkit as they embark on their sustainability efforts. Success will go a long way toward ensuring the continued well-being of children and families in the community.



# APPENDIX

## GLOSSARY

**Community of practice:** A community of practice (CoP) is a group of people who share a common concern, a set of problems, or an interest in a topic and who come together to fulfill both individual and group goals. Communities of practice often focus on sharing best practices and creating new knowledge to advance a domain of professional practice. Interaction on an ongoing basis is an important part of a CoP.

**Equity:** Equity involves increasing opportunities for individuals who receive an inequitable share of resources and opportunities because of social, psychological, and institutional structures. Equity work serves the purpose of narrowing the gaps between the most- and least-privileged individuals and groups, eliminating the predictability of life outcomes based on identity, and eradicating the disproportionality of which identity groups occupy the highest- and lowest-achieving demographics in society.

**Finance strategy:** A finance strategy combines financial planning with strategic planning. The outcome is a functional road map that assesses current resources, costs, and budget and aligns them with the program's mission and goals.

**Funding streams:** Funding streams are sources of funding acquired from federal, state, private, and local entities.

**Mission statement:** A mission statement is used by a program or organization to explain, in simple and concise terms, its purpose(s) for being. The statement is generally short, either a single sentence or a short paragraph.

**PDG B-5:** The Preschool Development Grant Birth Through Five (PDG B-5) Initiative provides competitive grants to states to strengthen their mixed delivery system of programs and services for young children. The goals of the program are to improve the school readiness of children from families with low incomes and to improve transitions from early childhood programs into elementary school. States are to improve collaboration and coordination among existing programs to increase access to programs, improve program quality, and maximize parental choice and meaningful engagement.

**Pooling funds:** Pooling funds are funds from many individual investors that are aggregated for the purpose of investment in a program, initiative, or system infrastructure. Many funding streams that support early childhood are categorical and targeted to specific populations of children or fund only specific services for eligible populations. Coordinating different funding sources—including federal, state, private, and local—can provide programs with greater flexibility, enabling them to reach a broader range of children or provide a wider range of services.

**Results-based accountability:** Results-based accountability is an approach to decision-making, evaluating, and budgeting that is guided by desired end results. It focuses on measurable outcomes and data-driven decisions.

**Sustainability:** Sustainability is the ability to maintain or support a process over time.

**Vision statement:** A vision statement describes the long-term goals for a program, organization, or business. Vision statements are lofty and ambitious, and they don't contain details or steps for achieving those goals. Vision statements are distinct from mission statements, though the two may inform each other.

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