Sustainability Worksheet #1:

Organizing a Sustainability Planning Team, and Developing Long-Term Vision and Goals

The October 2017 Strengthening Working Families Initiative (SWFI) National Grantee Convening culminated in a discussion of the value of beginning sustainability planning early in the SWFI grant period. To facilitate your sustainability planning efforts, we are creating a series of worksheets. Following this first worksheet, two more worksheets will be distributed at approximately six month intervals, so that sustainability planning remains top-of-mind during the full grant period, and so that your SWFI TA coach can help you monitor and resolve planning challenges as they emerge.

**Please note that this is the first of three worksheets. The next two worksheets will address** **data-driven decision-making and strategies for building long-term capacity and systems change**. This initial worksheet is intended to assist you in putting together an engaged team that is ready for thoughtful discussions about sustainability planning.

A. Organizing a Sustainability Planning Team

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| 1. Question: Do you have a sustainability planning team in place? *Consider: If not, which staff and partners could help with this effort?* |
| Answer: |
| 2. Question: Who “owns” sustainability planning for your program? *Consider: Who is or will be responsible for making sure your sustainability planning efforts progress?* |
| Answer: |
| 3. Question: Are a diverse group of staff and stakeholders participating in your sustainability planning efforts? *Consider: Staff and stakeholders might include program design staff, staff who work directly with participants, staff who build relationships with employers and trainers, and financial/administrative staff. If you do not have a diverse group of stakeholders and staff involved, who should be added to your sustainability planning team to ensure adequate representation across grant functions and goals?* |
| Answer: |
| 4. Question: What roles will be assigned to sustainability planning team participants? *Consider: How can you leverage staff and stakeholder strengths and interests in making assignments to committees/subcommittees, consultation on specific issues, or as liaisons to other groups or functions?* |
| Answer: |
| 5. Question: Does your team include staff and partners who can help with leveraging existing resources and applying for new resources? *Consider: If not, which staff and partners could help leverage existing resources and apply for new resources?* |
| Answer: |
| 6. Question: Have you created a timeline and workplan for sustainability planning? *Consider: When will you begin meeting? How frequently will the full team meet? How frequently will committees/subcommittees meet? When will consultants or partners become involved? Will your sustainability planning team continue to meet after the SWFI grant ends?* |
| Answer: |
| 7. Question: What deliverables will your team create? *Consider: How will you document and communicate your sustainability planning progress? When will you create these deliverables? What benchmarks must be reached to ensure you stay on track?* |
| Answer: |

B. Developing Long-term Vision and Goals

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| 1. Question: What are your program’s current mission and goals as they pertain to SWFI clients? |
| Answer: |
| 2. Question: What kinds of changes to your mission and goals might be needed to meet the job training and child care needs of your community? |
| Answer: |
| 3. Question: Will your SWFI completers need continued training, child care, and other supportive services (like transportation) to help ensure their long-term success after they leave the SWFI program? *Consider: What resources or partners in the community should be engaged now?* |
| Answer: |
| 4. Question: How is your SWFI vision aligned with the strategic priorities of your state, local workforce boards, and other workforce development efforts? |
| Answer: |
| 5. Question: How does your SWFI vision align with two-generation initiatives or other approaches gaining traction in your area with philanthropists or policy-makers? |
| Answer: |
| 6. Question: After considering these factors, what mission and goals are realistic and appropriate for your program after your SWFI grant ends? |
| Answer: |