

# SAE Sustainability Planning Checklist

Sustainability refers to the continuation of a program's goals, principles, and efforts to achieve desired outcomes. As you are developing or refining your Sustainability Plan, we encourage you to use this SAE Sustainability Planning Checklist as a guide when discussing strategies with your staff and stakeholders for sustaining the successful aspects of your grant program.

## Getting Started

- Form a Sustainability Planning Team with internal and external members.
- Develop a Sustainability Plan focused on the four key tasks outlined in this checklist:
  - Program Assessment
  - Succession Planning
  - Building and Maintaining Partnerships
  - Funding Stability
- Consider how you will communicate your Sustainability Plan to stakeholders when complete.

## Team Task #1: Program Assessment

Begin by identifying the various activities undertaken as a result of this grant and assess which ones have yielded or are yielding your successful outcomes. It may not be possible for all activities to be sustained--focus on the ones that have the greatest impact or are producing desired outcomes.

- Review program outcomes as a team to identify promising practices and protocols implemented with grant funding that contributed to successful outcomes, as well as lessons learned.
- Identify all currently funded state apprenticeship system activities, cross-check list with elements of successful apprenticeship expansion, and determine which activities need to be sustained. Update grant program goals to reflect your vision of sustaining these services.
- Identify all currently funded services and review labor market statistics for current industry needs. Determine if elements of funded services should be modified to meet these needs and what should be sustained through an economic transition. Update grant program goals to reflect your vision of sustaining these services.
- To make the case for sustainability, based on your findings in Task #1 present data to demonstrate success using storytelling and best practices.

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## Team Task #2: Succession Planning

As workforce development professionals, we know that staff and leadership changes can happen, especially towards the end of the grant lifecycle. It is important for participants to have continuity in services even if there are staff changes.

- Implement shared leadership by identifying job duties for staff and training back-up persons for each function. Identify any developmental needs and train accordingly.
- Identify mechanisms for sustaining program success (new policies, new protocols, professional development, engaging new partners, etc.).
- Create and maintain digital resources for all key grant documents.

## Team Task #3: Building & Maintaining Partnerships

Partners can play an important role in sustainability by connecting you to greater resources or expertise, providing services if your program no longer has funds available, and advocating on your behalf.

- For programs you funded, conduct a regional partnership and/or stakeholder analysis to determine if partners are interesting in sustaining the benefits of the program and are willing to be part of the planning process.
- Determine if support for OJL/OJT provided by SAE is still relevant for their needs.
- Identify and engage organizations that are impacted but not currently involved in program efforts and engage them in your sustainability efforts.
- Create a Stakeholder Management Plan based on your Task #3 findings.

## Team Task #4: Funding Stability

Planning for stable funding should be a strategic process that addresses the long-term needs of your program and adjusts to changing trends in economic cycles. Sustainability can depend heavily on diversification of funding sources.

- Develop a Funding Plan to address long-term key infrastructure needs of your program adjusted to economic trends and diverse funding sources. Include any additional funds needed and the return on investment on grant funds used.
- Determine availability of other sources of funding including WIOA, federal, state, and local government funds, industry funding, and support from foundations.
- Develop a braided funding strategy to combine funding sources and consider ways to restructure the program and existing staff roles so costs are covered by different sources.