

**2014 Southern Illinois
Rural Public Health Institute**

Sustainability Training

March 11, 2014



Training Overview

- Welcome Remarks

- Introductions

- Objectives

- Describe the sustainability planning process.
- Identify individuals to include on your planning teams.
- Use QI tools to facilitate sustainability planning meetings.



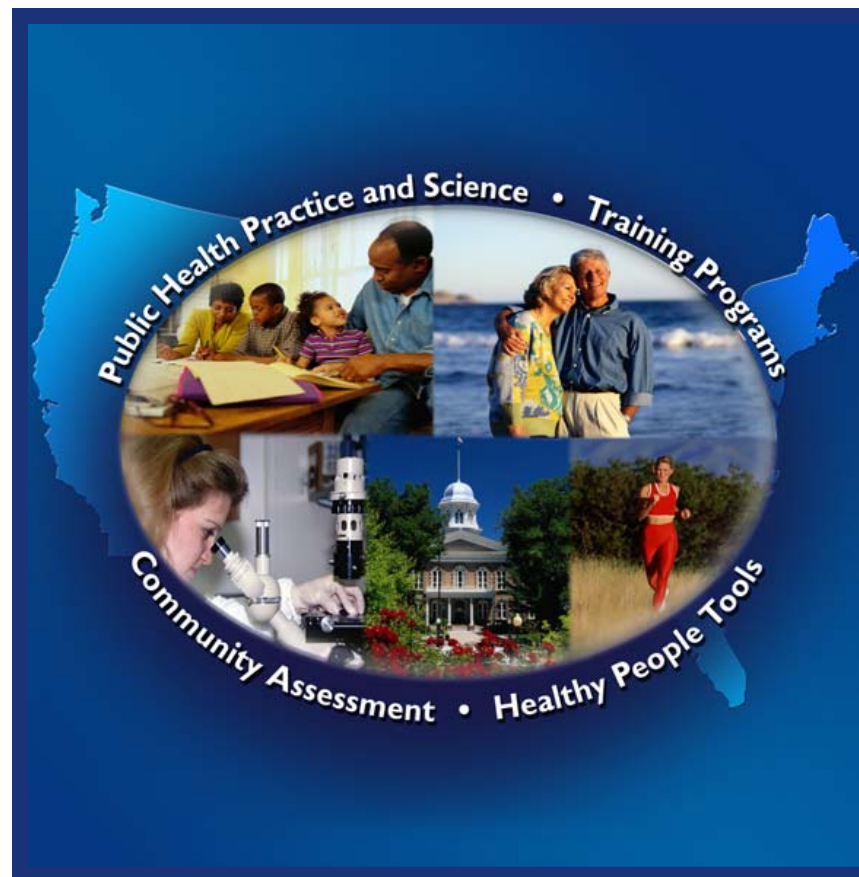
...PHF Mission:

We improve the public's health by strengthening the quality and performance of public health practice

<http://www.phf.org>

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*Innovative Solutions.
Measurable Results.*



- “Today, more than ever, community leaders understand that improving the health and well-being of individuals and families means changing health-related behaviors—and that means addressing factors that influence those behaviors. In light of changing funding opportunities and increased competition for resources, communities need to ensure that they maintain the capacity to work in partnership to identify and address public health challenges, and that their resulting health initiatives can have lasting—that is, *sustainable*—impact.”

Sustainability

- Is not just about funding.
- Is it about creating and building momentum to maintain community-wide change by organizing and maximizing community assets and resources.
- It means institutionalizing policies and practices within communities and organizations. From the outset, sustainability requires an approach that emphasizes the development of a network of community practitioners who understand and can lead community efforts.
- It also means involving a multiplicity of stakeholders who can develop long-term buy-in and support throughout the community for your coalition's efforts.

Working Definition of Sustainability

A community's ongoing capacity and resolve to work together to establish, advance, and maintain effective strategies that continuously improve health and quality of life for all.

Why Develop a Sustainability Plan?

- Developing a plan is a critical part of the sustainability process. A plan can help your coalition:
 - Obtain input and buy-in from coalition members and key external decision-makers.
 - Define critical long- and short-term strategies.
 - Create an organizational plan to attract and make the best use of human, financial, and in-kind resources for achieving these strategies.

Key Elements of Sustainability

- In order for sustainability to become a reality, coalitions need:
 - Buy-in and support from key decision-makers as well as community volunteers.
 - Sufficient leadership, funding, and channels of communications.
 - Procedures in place to monitor results through enforcement and compliance, and to modify strategies accordingly.

Key Elements of Sustainability

- Coalitions also need to:
 - Create a long-term plan for ensuring the viability of the coalition or initiative.
 - Develop a diverse funding portfolio, collaborative leadership, and marketing/branding strategies.
 - Ensure that all community stakeholders are ready to respond to a changing environment.

Planning Team

- Responsible for discussing relevant issues, making decisions, and ultimately implementing the sustainability plan.
- Reminder: While the size of this team is whatever best suits your coalition, remember that demands for communication and staff support increase as the number of people involved in the planning process increases.
- Ultimately, it is important to include both internal and external representatives.

Planning Team

- To ensure that your effort is valued in the community, consider inviting (or solicit input from) key external representatives from:
 - Community officials (e.g., from city hall or the local transportation authority)
 - Businesses or corporations
 - Nonprofit organizations or foundations
 - Other groups (e.g., faith-based, recreation, neighborhood homeowner associations)
 - Local, regional, and state policy-making groups

Planning Team

- Internal stakeholders can also be involved in the planning process as long as they meet the needs of your coalition's planning effort and overall strategic goals. Included individuals may include (but are not limited to):
 - Executive or steering committee members
 - Coalition coordinators and project managers
 - Staff and volunteers

The Six Step Planning Process

- Step 1: Discuss Sustainability with Coalition Members
- Step 2: Assessment – Discover Your Driving and Restraining Forces
- Step 3: Identify Possible Activities for Sustaining Efforts
- Step 4: Prioritize Activities
- Step 5: Implement Sustainability Activities
- Step 6: Communicate Sustainability Efforts



Step 1: Discuss Sustainability

- Discuss sustainability with coalition members.
- Create a shared understanding of what sustainability means to your coalition and other key community stakeholders.
 - May need to develop a mission statement
 - May need to develop a vision statement
- Develop a planning timeline and a structure for conducting/running meetings.



Step 1: Small Group Work

Brainstorm characteristics/traits of successfully sustained projects.

(Record your responses on flip chart paper.)



Step 2: Assessment

- In thinking about your coalition's work, identify your current state.
- Using your understanding of what sustainability means to your coalition and other key community stakeholders, identify your desired state.



Step 2: Assessment – Force Field Analysis

- Brainstorm the positive factors that can/will help you move toward your desired state (driving factors).
- Brainstorm the negative factors that have/may held you back from moving forward (restraining factors).
- Create your Force Field Diagram.



Force Field Diagram - Basic

Positive Forces



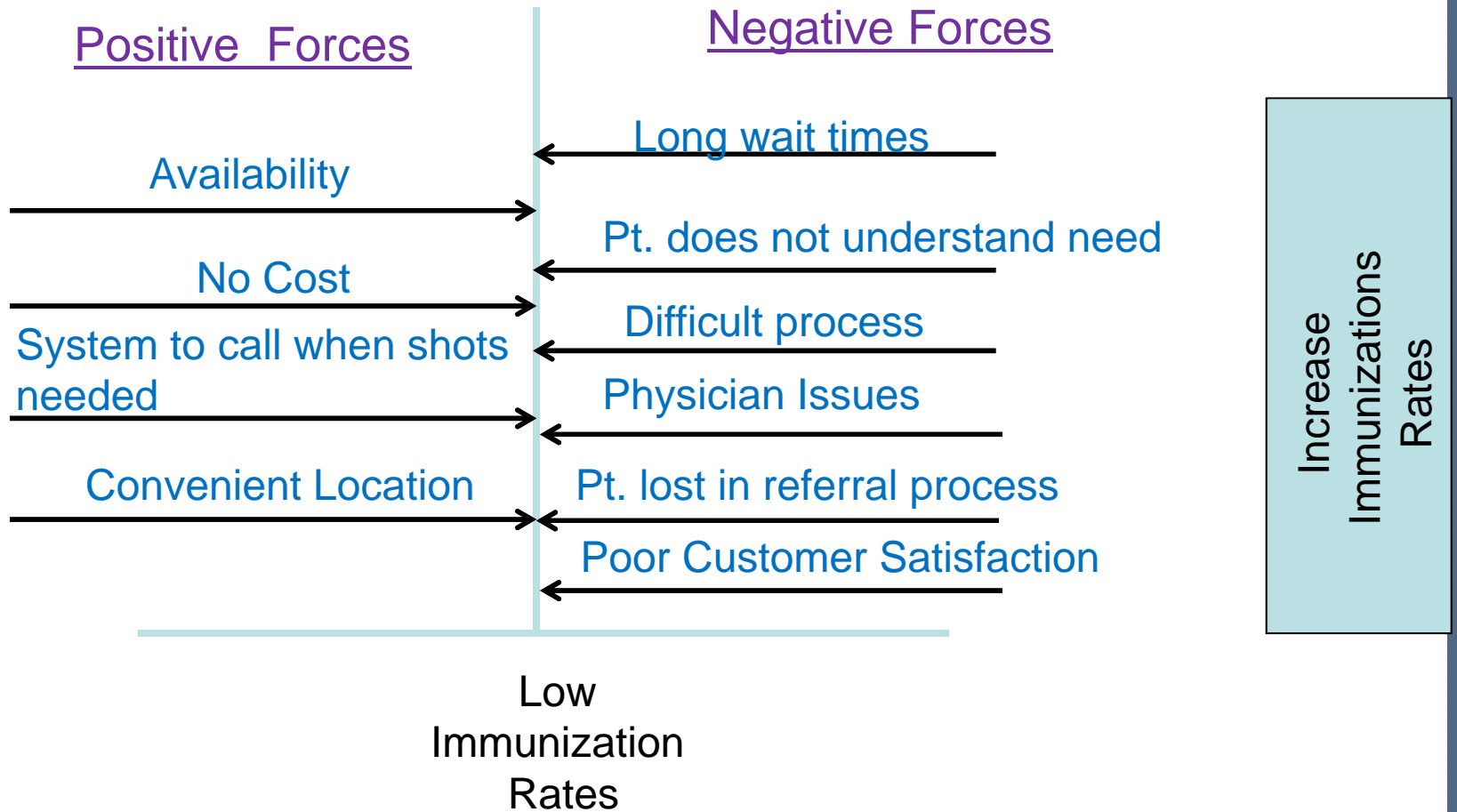
Negative Forces



Desired State

Current
State

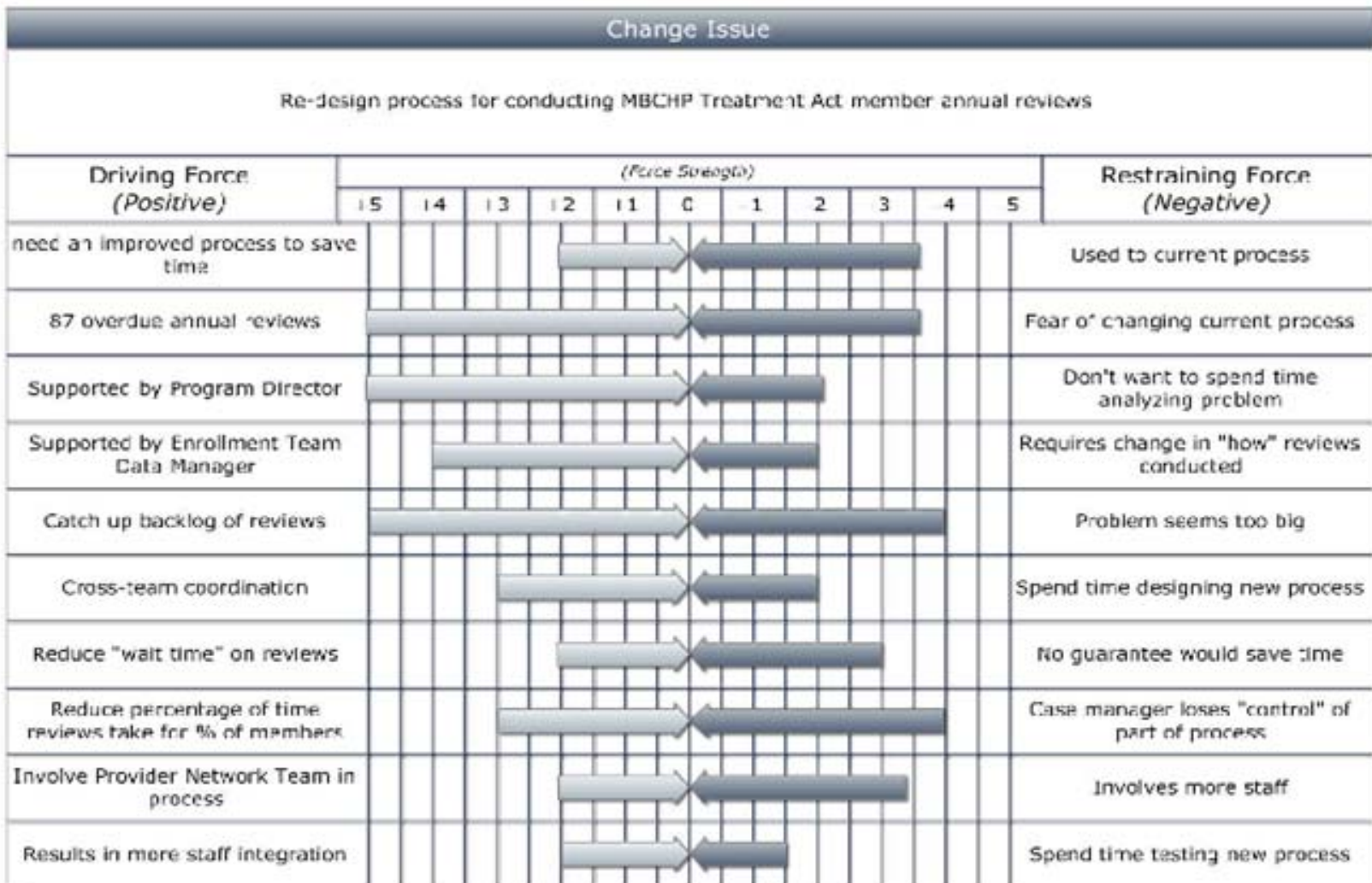
Force Field Diagram



Step 2: Assessment – Force Field Analysis

- For each positive factor, rate the factor's strength (scale of 1-5; 1 being weak, 5 being strong)
- For each negative factor, rate the factor's strength (scale of 1-5; 1 being weak, 5 being strong)

Force Field Analysis



Maine CDC, Division of Chronic Disease, Maine Breast and Cervical Health Program

Step 2: Small Group Work

1. Brainstorm restraining and driving factors.
2. Rate the strength of each factor.

(Draw your force field diagram on flip chart paper.)



Step 3: Identifying Activities to Sustain Efforts

- Brainstorm activities to move continue efforts in the community.
- One tool you can use is a Solution and Effect Diagram.



Step 3: Identifying Activities to Sustain Efforts

➤ **Solution and Effect Diagram**

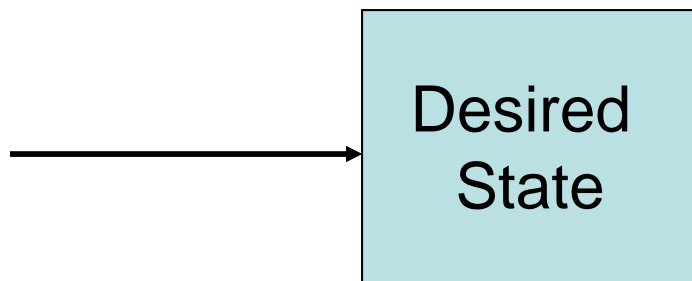
- Used to identify :
 - Changes
 - Recommendations

- Allows planning team members to share their ideas – open communication

- Helps teams operationalize big picture ideas

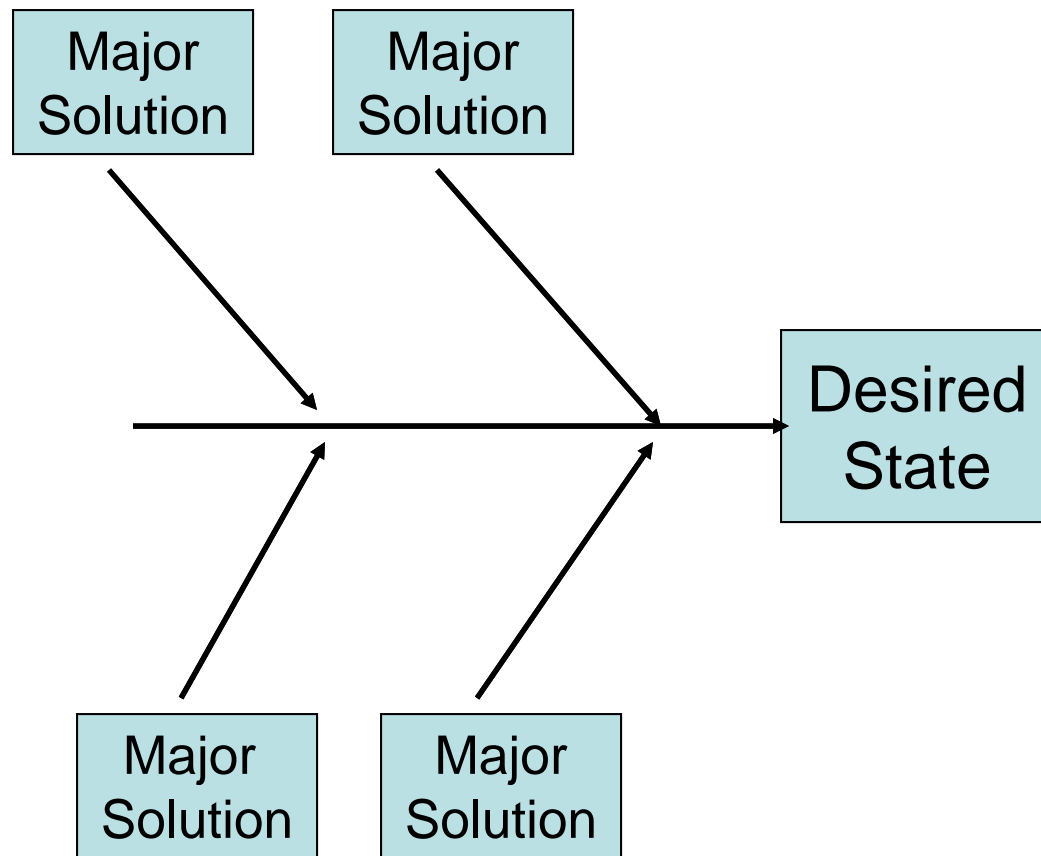


Solution and Effect Diagrams – Construction



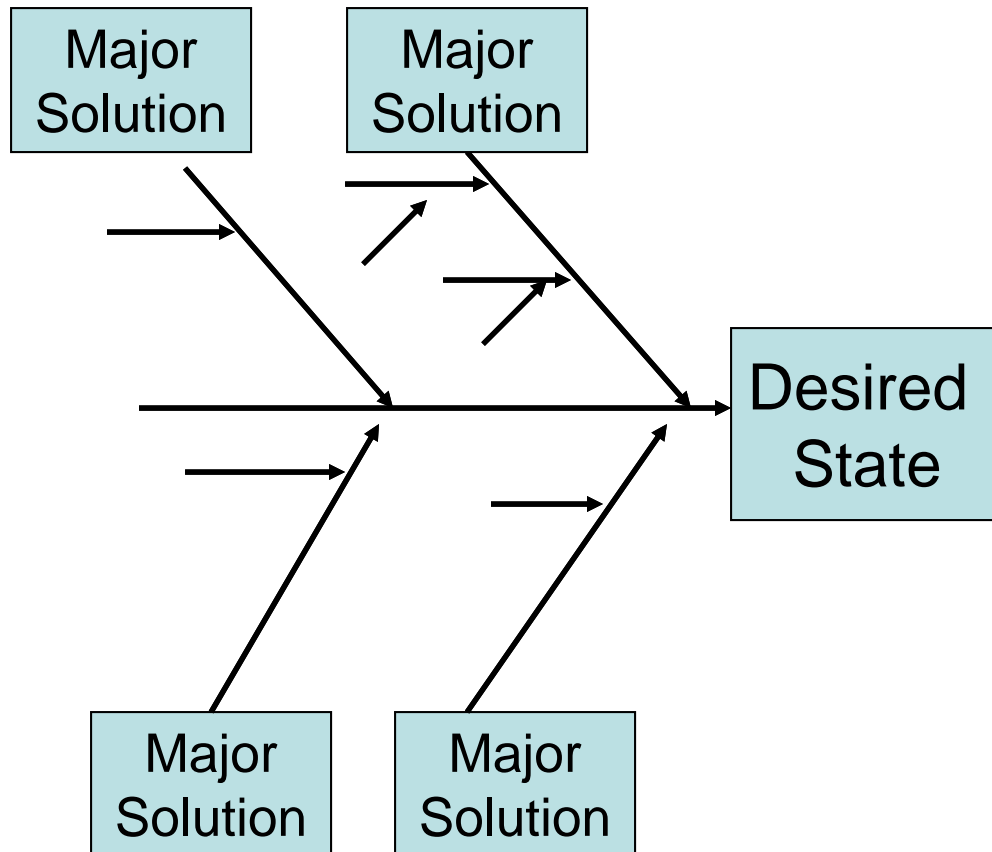
- Write the desired state on the left hand side of the page and draw a box around it with an arrow running to it.
- The desired state is the effect

Solution and Effect Diagrams – Construction



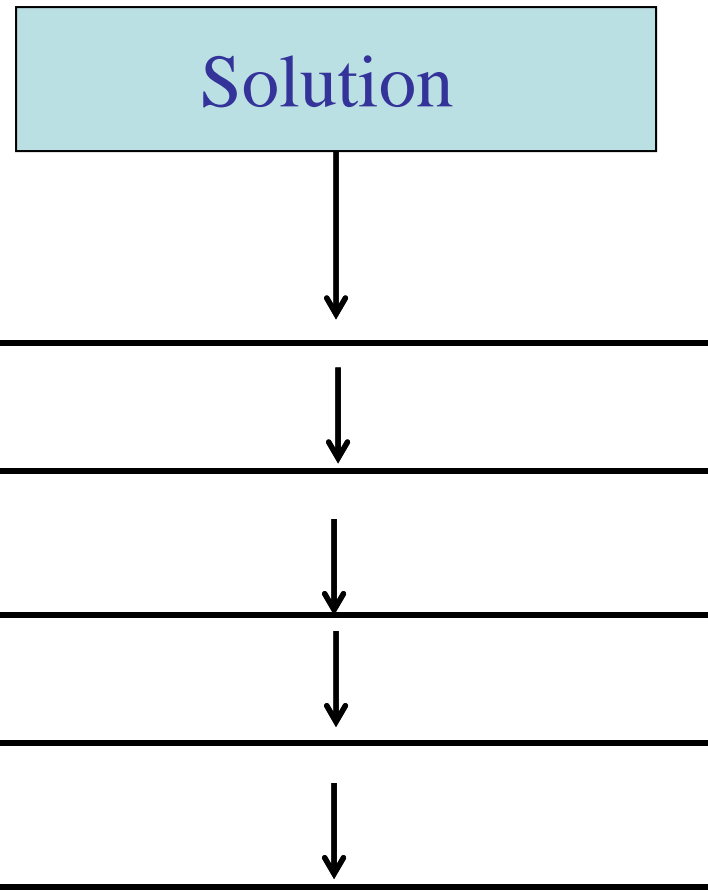
- Generate ideas as to what are the Major Solutions of the effect
- Label these as the major branch headers

Solution and Effect Diagrams – Construction



- For each Major Solution category brainstorm ideas as to what are the related sub-solutions that might contribute to achieving the desired state
- Use the 5 How techniques when a solution is identified
- Keep repeating the question until no other solutions can be identified
- List the sub-solutions using arrows

5 How's Technique



How?

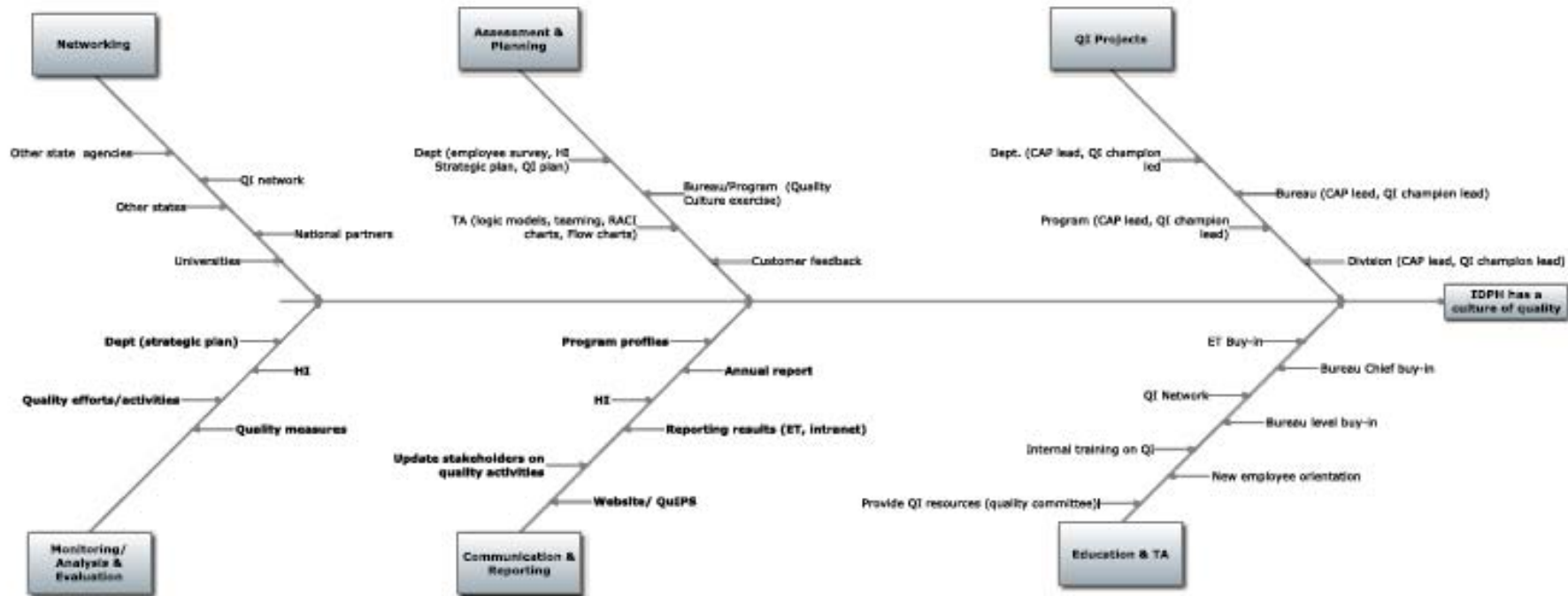
How?

How?

How?

How?





Step 3: Small Group Work

1. Brainstorm possible activities to help achieve your desired state.
2. Develop a Solution and Effect Diagram.

(Draw your force field diagram on flip chart paper.)



Step 4: Prioritizing Activities

- After having identified potential activities, you need to prioritize activities.
- Assessment - Control vs Influence
- Prioritizing can be done in a variety of ways
 - Nominal Group Technique
 - Impact – Difficulty Matrix

Step 4: Prioritizing Activities

➤ Impact - Difficulty Matrix: Why use it?

- To visually show (in one graphic) the anticipated impact and difficulty of implementation of your proposed solutions.
- Allows for dialogue among members of the planning team
- Helps identify short-term and long-term activities
- Helps prioritize solutions.



Step 4: Prioritizing Activities

- Constructing an Impact-Difficulty Matrix
 - Review the activities under each branch (header) on your Solution and Effect Diagram
 - Number each activity under each branch (e.g., S1, S2, S3, S4, etc.)
 - For each activity (e.g., S1), ask the team the following:
 - What impact will this activity have on helping us achieve our desired state?
 - What will the difficulty be in implementing this activity?
 - You can use the information from the control vs influence discussion to help determine difficulty.
 - You can use the sub-arrows (under each main activity) to help determine difficulty.



Step 4: Prioritizing Activities

- **Constructing an Impact-Difficulty Matrix**
 - Determine a final impact rating for each activity (on a scale from 1-10; 1 being little to no impact, 10 being extremely impactful)
 - Determine a final difficulty rating for each activity (on a scale from 1-10; 1 being very easy, 10 being extremely difficult).
 - Draw a 2x2 chart (with impact on the vertical axis and difficulty on the horizontal axis).
 - Plot each activity on the 2x2 chart according to its final rating.

High

Impact

Low

Low

Difficulty

High

S1



S4



S5



S2



S3



S6



Step 4: Prioritizing Activities

- Analyze your proposed activities
 - Which activities are high-impact, low-difficulty?
 - Which activities are high-impact, high-difficulty?
 - Which activities are low-impact, low-difficulty?
 - Which activities are low-impact, high-difficulty?



High

Impact

Low

I—High Impact
Low Difficulty



III—High Impact High
Difficulty



II—Low Impact
Low Difficulty



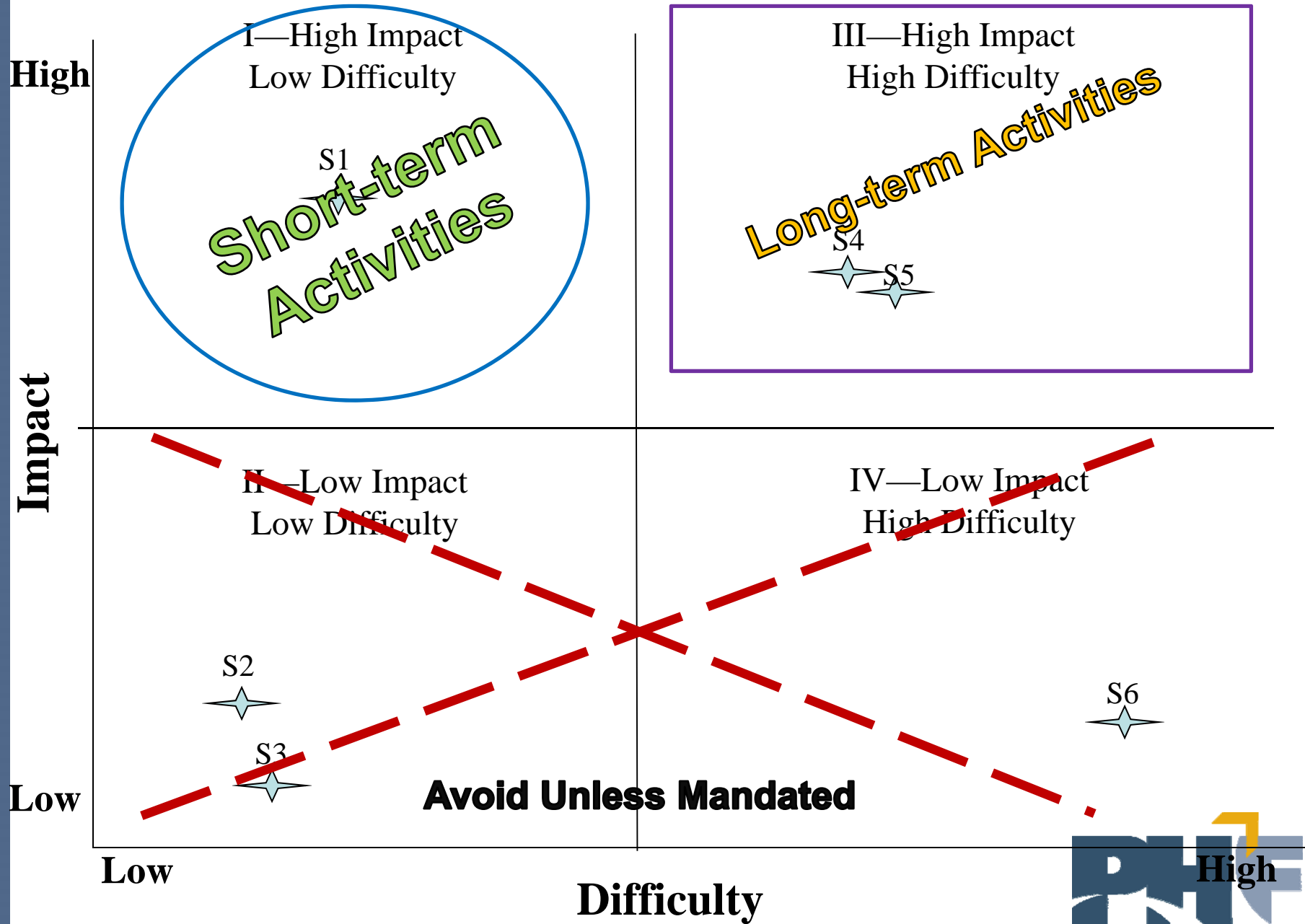
IV—Low Impact High
Difficulty



Low

Difficulty





Step 4: Small Group Work

1. Number each of your proposed activities.
2. Discuss whether you have control of the activity or will influence the implementation of the activity.
3. Rate the impact and difficulty of each activity.
4. Develop a 2x2 chart on flip chart paper.
5. Plot each activity according to its rating.



Step 5: Implementing Sustainability Activities

- To assure activities are implemented it is important to develop a plan for moving forward.

- The plan should include:
 - Short-term and long-term activities
 - Person(s) responsible for each activity
 - Timeframes

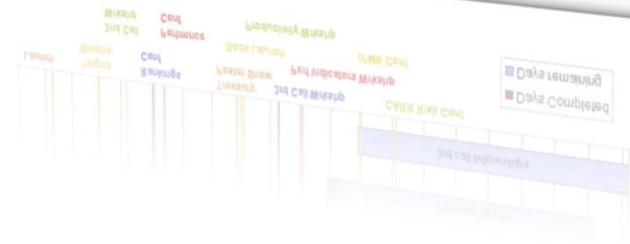
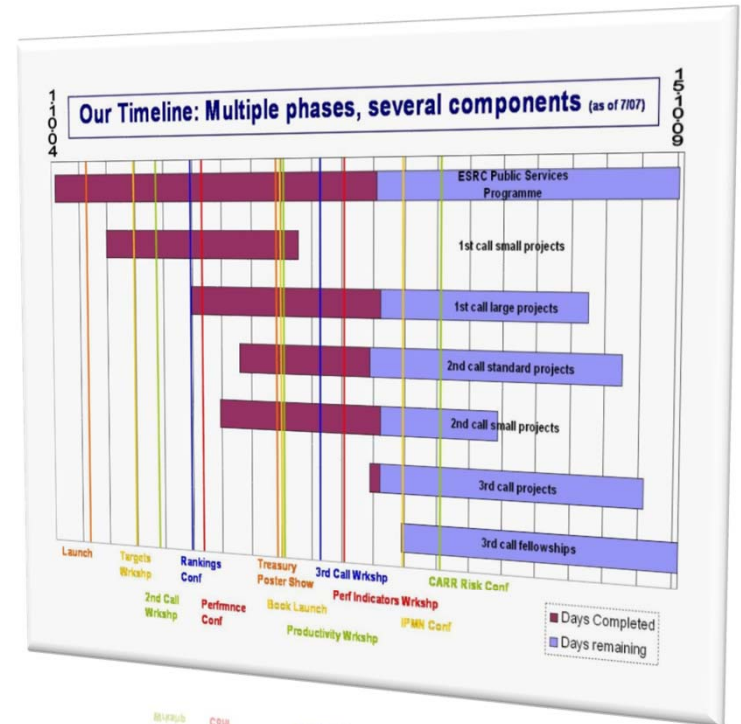
- The plan may also contain:
 - Resources
 - Status indicators



Step 5: Implementing Sustainability Activities

Gantt Charts

Planning for Implementation



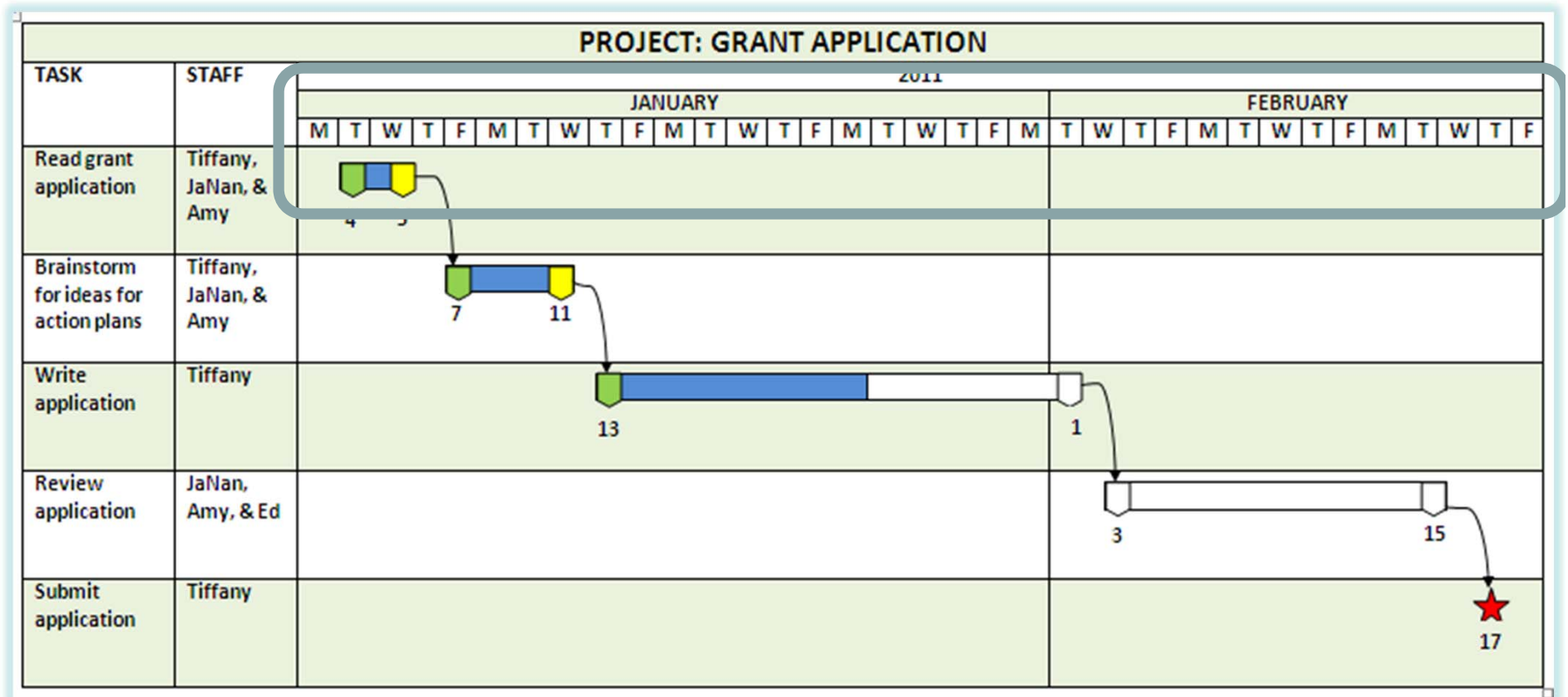
Reasons to use

- A great deal of time, resources, energy, emotion spent on identifying solutions
- Assures a smoother execution
- Details steps, predecessors, and timeline
- Determination of who needs to be involved
- Builds in accountability



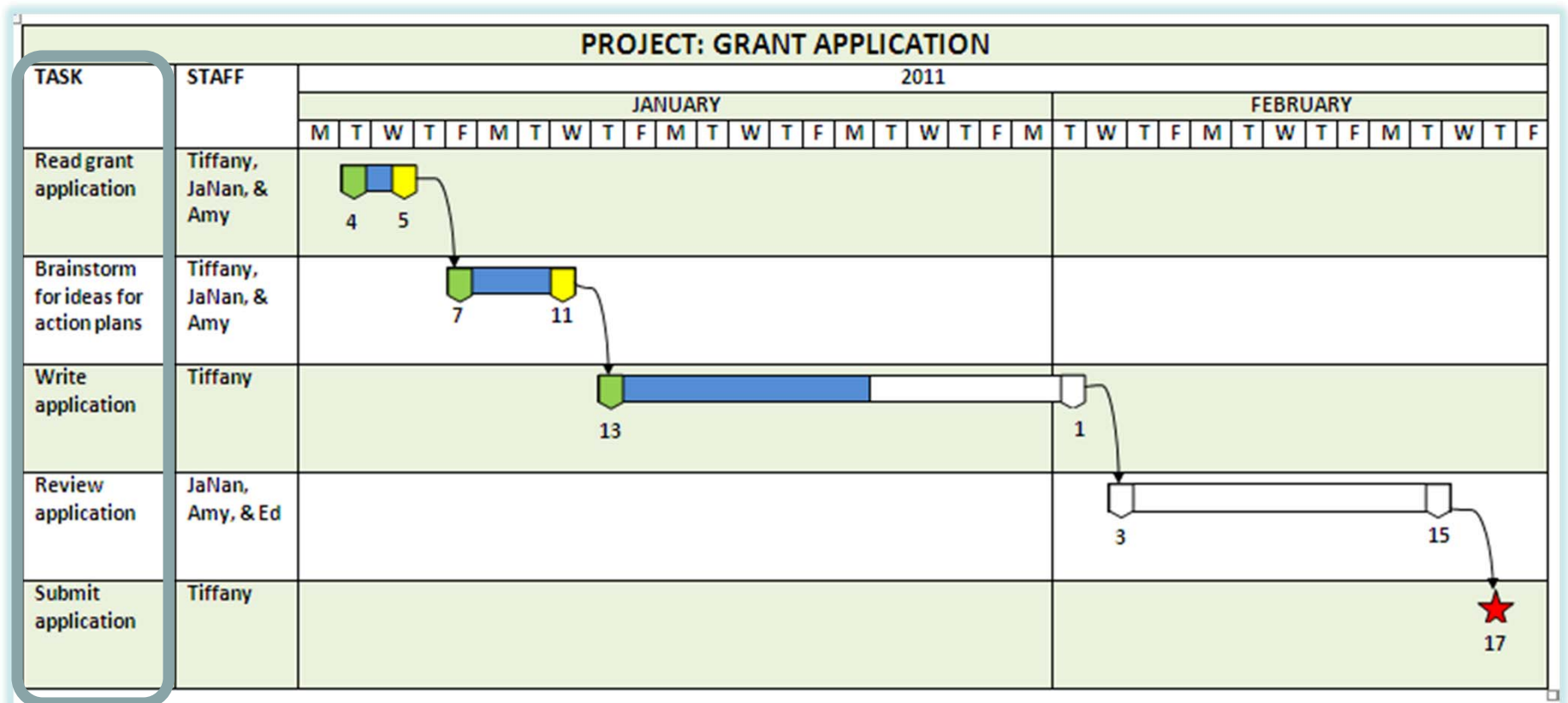
Horizontal Axis

The Gantt chart is constructed with a horizontal axis representing the total time span of the project, broken down into increments (days, weeks, or months).



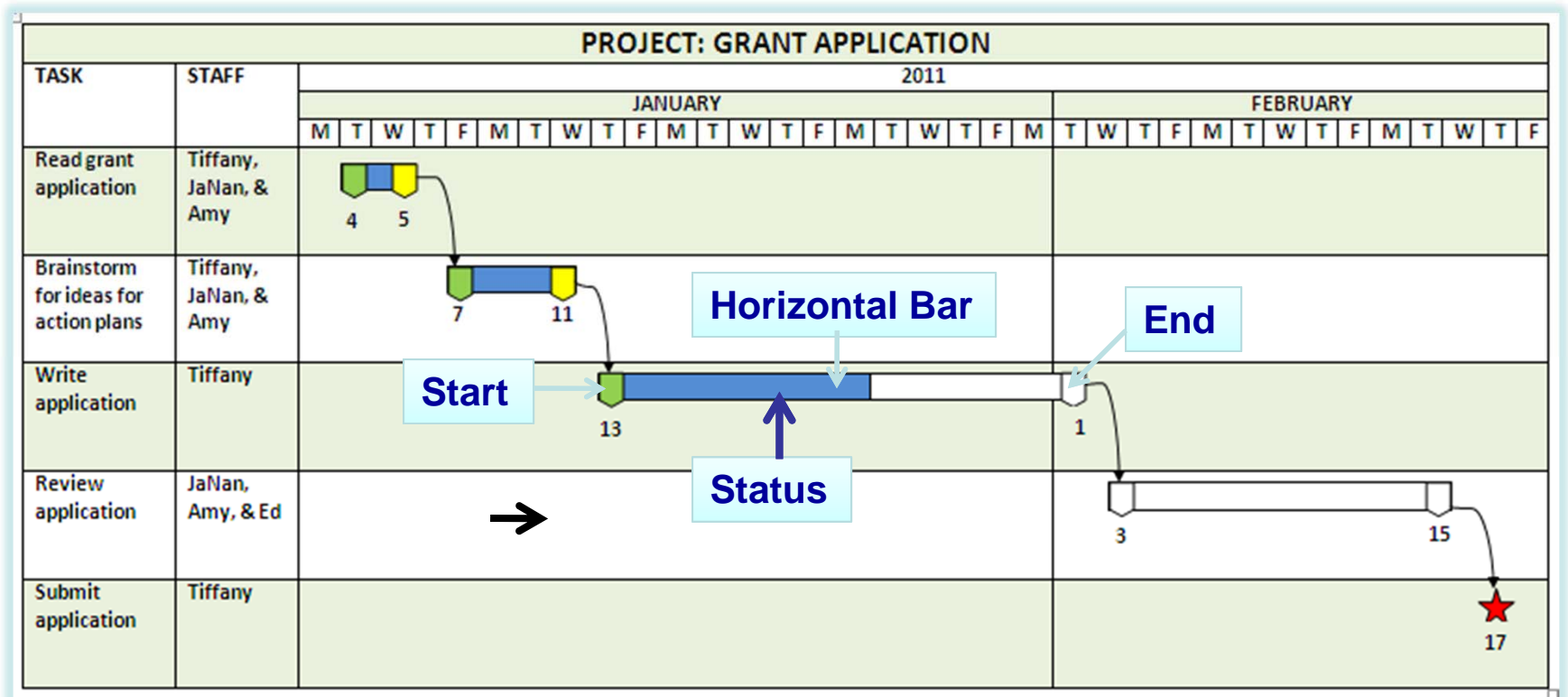
Vertical Axis

The Gantt chart is constructed with a vertical axis representing the tasks that make up the project.

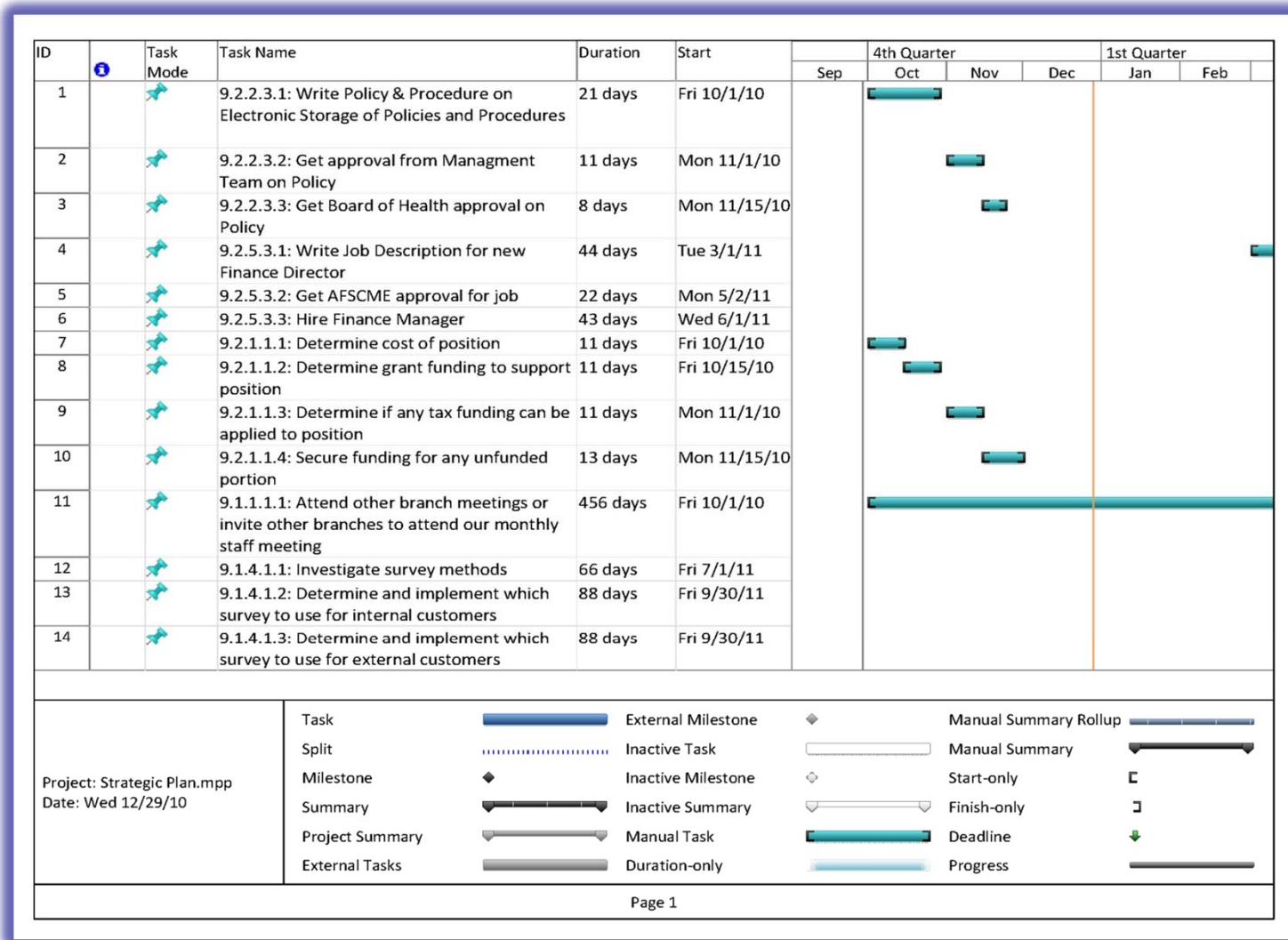


Graph Area

The Gantt chart is constructed with a graph area which contains horizontal bars for each task connecting the period start and period ending symbols.



Gantt chart – Microsoft Project



Example - Stoplight Gantt

Jones & Jones
Certified Public Accountants

Created Using Milestones Software
www.kidasa.com

Project/ Project Lead	Project	2002					Status
		January	February	March	April	May	
TCL, Inc.		20 9					
J. Vannie	Audit	20 7					
S. Simmons	Audit Review		3 8				
B. Barrett	Business Proposal		17 5	9			
Fisher & Sons, Inc.		18 2					
M. Rhodes	Audit	18 20					
S. Simmons	Audit Review			4 26	8		
J. Paoli	Business Proposal				11 16	2	

COMPLETE
 BEHIND
 AHEAD

Warning: Dates on a Gantt Chart Are Closer Than They Appear



Use Of Gantt Charts

- Establish order of tasks:
 - Sequential and Parallel
- Identify resources requirements
- Timing of resource needs
- Identify the critical path
- Monitor the project “On-Time” Schedule
- Alerts where remedial action is required



Step 6: Communicating Sustainability Efforts

- Communication is a critical component of sustainability
- Communication plans help identify your audiences, messages, communicators, and modes of communication.
- Resource:
 - Spitfire Strategies Smart Chart



SMART CHART 3.0

STEP 1: Program Decisions

Smart Goal: What do you want to achieve over the long term?

Objective: What is the first measurable step you need to accomplish over the next 12 months to move toward your goal?

Decision Maker: Who can make your objective a reality by taking a specific action or changing a specific behavior?

STEP 2: Context

Internal Team: What are your organization's assets and challenges that may impact your strategic design, staffing skills, resources, operations, etc.?

Assets: **Challenges:**

External Team: What is already happening outside your organization that may impact your strategic design, timing of the news or events, activities of other organizations in the space, barriers, audience may face in taking action, other potential obstacles or opportunities?

Assets: **Challenges:**

Define Your Position: Do you need a plan that will frame, clarify and amplify or reduce the debate?

Frame the case in talking about your team
 Clarify and Supply facts like the Situation-Status-Action to push it further!
 Balance (you want to change the decision about your team)

STEP 3: Strategic Choices

Decisions to Make	Audience 1	Audience 2	Audience 3	Reality Check
Audience Target: Who are you wanting to achieve your objective? <i>(Think: you need to identify three audience types. The more you have that target in your mix, the better!)</i>				Who can best help you achieve your objective? Who can you persuade? Think small! Segment your audience as much as possible. The more they understand you, the more likely they will be to help you achieve your objective.
Business: Where is your audience or your team? Are they ready for what you are trying to sell them?	<input type="checkbox"/> Stage 1: Sharing Knowledge <input type="checkbox"/> Stage 2: Building Will <input type="checkbox"/> Stage 3: Reinforcing Action	<input type="checkbox"/> Stage 1: Sharing Knowledge <input type="checkbox"/> Stage 2: Building Will <input type="checkbox"/> Stage 3: Reinforcing Action	<input type="checkbox"/> Stage 1: Sharing Knowledge <input type="checkbox"/> Stage 2: Building Will <input type="checkbox"/> Stage 3: Reinforcing Action	If they don't perform about, say, action and follow in your area, think Stage 1. If they know, say and follow, but aren't ready to act, think Stage 2. If they're already taking action and are ready for the next step, think Stage 3.
Core Content: What writing/information can you use to engage and persuade with your audience? What writing/information might be a barrier/pitfall to success?	Title: Series:	Title: Series:	Title: Series:	What does the audience believe? What's their world view? Make simple, credible stories (e.g., get parents to an evening meeting, you may need to provide additional information like gifts, snacks or food) to be compelling for the audience.
Theme: How do you want to position your audience and influence the conversation? (You can't say it all, so you need to be clear. For example, if your audience's core concern is that productivity, your theme might be "we can't afford not to invest.")				Select 2 themes that address the audience's beliefs, not your own. Offer topics for change. Consider the audience you want to write and the time you are in. Write, read, and repeat. Use all marketing materials to reinforce the gift, share or that leads to the opportunity.
Message: What key points do you want to make with each target audience?	no message of the sort to fill out your message	no message of the sort to fill out your message	no message of the sort to fill out your message	Make one per message: <ul style="list-style-type: none"> - Acknowledges the audience's core concerns - Describes, rather than defines, their barrier - Offers an idea that is more credible than the barrier itself that outweighs the risk - Highlights what and why you are the best person and - Demonstrates your character
Message: Who will be most likely to influence? Who is their social reference group on your team? (Compare them to a trusted leader taking action)	↓	↓	↓	People close to people, not institutions. Make sure your message is credible. The right message delivered by the wrong messenger may fall on deaf ears.

STEP 4: Communications Activities

Timeline: What activities do you need to deliver your message to your target audience? (e.g., meeting, Web site, newsletter, press events, letters, phone calls, public relations?) (Don't forget to consider organizational capacity)	Timeline: How will you implement each tactic? (Who's key, day, location and events. Be realistic - you can't communicate with all audiences at once. How do you plan to get the message to the intended audience? How do you plan to get the message to the intended audience?)	Assignments: Who will implement each activity and in what order? (Who's key, day, location and events. Be realistic - you can't communicate with all audiences at once. How do you plan to get the message to the intended audience?)	Budget: How much time and money do you need to reach each of the audience segments? (You can't say it all, so you need to be clear. For example, if your audience's core concern is that productivity, your theme might be "we can't afford not to invest.")
Audience 1 Series:			
Audience 2 Series:			
Audience 3 Series:			

STEP 5: Measurements of Success

Objective: What will you produce to reach your objectives (e.g., results card, events planned, phone calls made)?	Outcome: What is the result of your efforts that demonstrates movement/progress toward your objectives (e.g., increased donations, positive feedback, new members)?

STEP 6: Final Reality Check

Before you put your plan into action, test for success by asking yourself the following questions:

- Is the strategy feasible?
- Is the plan realistic in line with your budget? (Does your internal and external team support the timeline you've made?)
- Is the communication the right people to take the right action at the right time?
- Are your stories credible? (Does the logic flow from one line to the next? By highlighting your audience's barrier - e.g., by acknowledging their barrier using their message, you will make their message, support the theme, lay into the audience, raise the target audience, etc. Does the logic flow as well as possible and address your barrier through the next? If not, go back and address the barrier.)
- Will the audience perceive your objective? (If they reach the appropriate audience?)
- Are you providing the best person possible to act on behalf of the audience? (Think, sharing things, making them the hero, providing the best within the world view, etc.)
- Are there any assumptions or guesses built into the plan that require further research to verify or correct?
- Is there anything in your organization to implement the plan?
- Are there other objectives you need to Smart Chart to ensure you're taking a comprehensive approach to reach your overall goals?
- Can you measure progress?

If you answered no to any of these questions, go back and work through your strategy again. Don't remember, you may have other objectives you need to Smart Chart separately to ensure you're taking a comprehensive approach to reach your overall goals.

- Smart Chart 3.0:
1. Long-range communication goal.
 2. Context
 3. Audiences, concerns, and messages
 4. Communication activities
 5. Measurements of success
 6. Final reality check



Wrap Up

➤ Next Steps

➤ Questions

➤ Adjourn

