Using the Self-Assessment Tool to Benchmark Progress and Identify Priorities

Life Skills Training

Webinar Series
November 4, 2010

Sustainability Planning Webinar Series

- **October 27:** Overview of the Sustainability Planning Framework and Process

- **November 4:** Using the Self-Assessment Tool to Benchmark Progress and Identify Priorities

- **December 1:** Developing a Vision and Results Orientation

- **January 13:** Creating a Strategic Financing Plan

- **February 15:** Organizational Capacity and Community Support

- **MAY 10:** Developing and Writing the Plan

Goals for this webinar series

1. Share a framework and process for sustainability planning

2. Provide information, guidance and tools to support sites in creating a sustainability plan

3. Create opportunities for dialogue and peer learning across LST grantee sites

4. What are your goals?

   - Learn about effective sustainability strategies and practices
   - Understand funding sources
   - Guidance and tools to work on a sustainability plan

Brief Recap of Webinar #1

- Introduced the sustainability framework and planning process

- Provided guidance and tools to:
  - ✓ Identify who to include on your sustainability planning team
  - ✓ Develop a workplan

- Reflections
  - ✓ Even though LST grantees are working in different locations, we're seeing things through a similar prism ("wordle" slide)
  - ✓ Sustainability planning requires buy-in and ongoing commitment to be successful

What is sustainability planning?

It's the process of sitting down and developing *specific strategies* and an *action plan* to help ensure the long-term sustainability of LifeSkills Training.

It involves considering a *full range of resources and competencies* (financial, administrative, managerial, political) needed to meet long-term goals.

Key Elements of Sustainability

1. Vision
2. Results orientation
3. Strategic financing orientation
4. Adaptability to changing conditions
5. Broad base of community support
6. Key champions
7. Strong internal systems
8. Sustainability plan

ELEMENT SIX: Adaptability to Changing Conditions

LST leaders seek new opportunities for resource development and support and are able to respond to new opportunities (for example, education reform, newly elected or appointed leaders) as they arise.

LST Leaders:	1	2	3	4	5	Comments
A. monitor changes in the policy and program environment to see how LST could fit with new directives and agendas. (*for example, could LST become an approved curriculum*?)						
B. consider how LST can be framed or positioned to interest different funders (public, private, individual) and to take advantage of new financing opportunities.						
C. use this information to approach new funders.						
D. have identified opportunities to participate in efforts to improve the overall policy and program environment (e.g., standing advisory groups, opportunities to develop or comment on state plans for expending prevention and/or youth development federal funds).						
E. actively participate in decision-making processes about changes in policy and practice.						
F. have determined how we can improve our ability to participate in these efforts (for example, by establishing their credibility as technical experts, community representatives, or controllers of resources), and have followed through to increase the likelihood of being able to participate.						

Using the Self-Assessment Tool

- Diagnostic tool to help you:
  - assess progress
  - identify strengths and weaknesses
  - determine where to target scarce resources

- Organized by elements; rank your progress toward a desired state

- First step in developing a sustainability plan

Completing the Self-Assessment

- ○ Define "LST leaders"

- ○ Send the self-assessment tool in advance to sustainability planning team and others. At a following in-person meeting, choose to:

a) Read each task together as a group – poll on rank and discuss

b) Participants rank individually – then poll and discuss *each task*

c) Participants rank individually – then poll and discuss *only tasks with wide variation*

Completing the Self-Assessment: Weighing the Options

a) Read each task together as a group
   - Detailed look at the full scope of work
   - Can take up to a full day to discuss

b) Rank individually; discuss EACH task
   - Promotes broad-buy in and common understandings
   - Less time intensive – can take 1 ½ to 3 hours

c) Rank individually and discuss ONLY tasks with wide variation in rankings
   - Shortest approach: may take 1 to 2 hours
   - Key points or quieter voices may be missed

What approach would work best for your sustainability planning group?

Tips for an Effective Process

○ Remind the sustainability planning team that this is not a critique – "embrace the one"

○ The goal is not consensus – allow for diversity of opinion and sharing of information
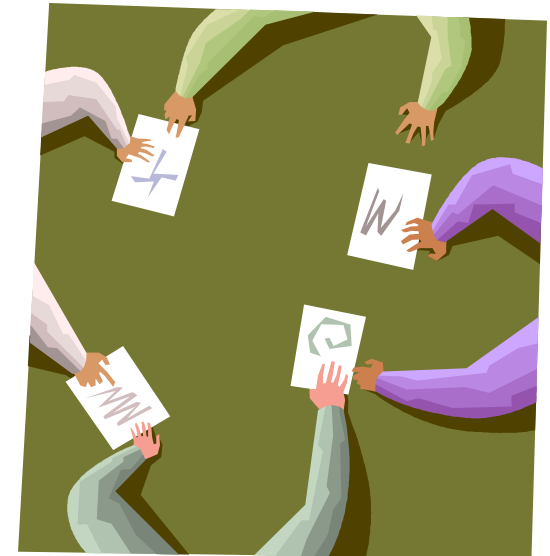
Self-Assessment Tool: Experience from the Field

Using the Self-Assessment Tool to Identify Priorities

Once you have completed the self-assessment tool, reflect on the following:

1. Under what element(s) has your LST initiative made the most progress?

2. What element(s) would you/your LST initiative like to target for growth in the future?

3. What is one step that your sustainability planning group could take to begin work on the priority elements you've identified?

Using the Self-Assessment Tool to Benchmark Progress

Options for comparing your self-assessment results over time:

1. Complete a full self-assessment annually

2. Complete updated self-assessment results for only those elements identified as priority areas for improvement

3. Include sustainability self-assessment results as a portion of your written sustainability plan (charts; quotes; appendices) and incorporate into regular review

Contacting Us

The Finance Project
1401 New York Avenue, Suite 800
Washington DC, 20005
(202) 628-4200
www.financeproject.org

Shawn Stelow Griffin, Senior Program Associate, sstelow@financeproject.org
Jenifer Holland, Senior Program Associate, jholland@financeproject.org