

Session 2: Building a Foundation for Sustainability

Part 2

OVC HTC's *Sustainability and Strategic Planning Training Series* – Spring 2023

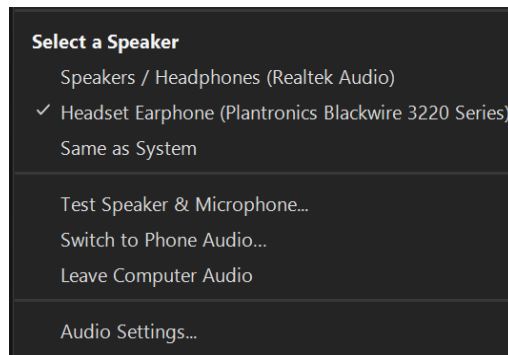
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Here are some helpful tips for using Zoom during today's session:

Audio Connection:

Select the arrow next to the audio button to access audio features and select your speakers and microphone.



Chat:

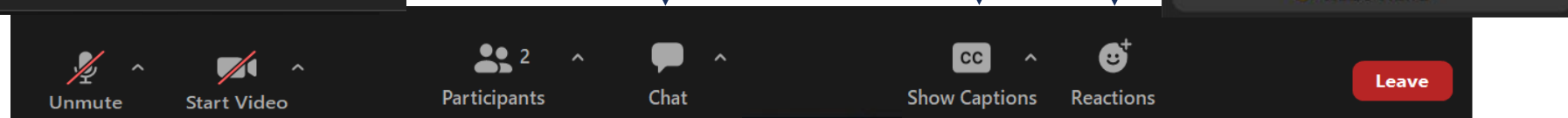
The default setting is to message everyone. Please note that if you want to send a message to one of the hosts privately, use the drop-down and select their name from the list of options.

Closed Captioning:

Please click the **Show Captions** button to view closed captioning.

Reactions:

Click **Reactions** to see/select the 'Raise Hand' function or share a reaction with the group.



Technology and Accessibility Reminders

- The material presented during the 2023 Sustainability and Strategic Planning Training Series will be recorded and shared with attendees via email in the following days.
- OVC HTC is committed to providing universal access to all of our events. To request accessibility accommodations (e.g., sign language interpreters, large print), please contact HTCollective@icf.com to discuss with an HTC team member. Advance notice is necessary to arrange for some accessibility needs.
- As with all technology, we may experience a momentary lapse in the breakout session. If you experience any issues re-accessing the platform or with the audio during this session, please email our technical specialist, Jameel Evans, at jameel.evans@icf.com for assistance.

Evaluation

- At the conclusion of each session, participants will be prompted to complete a short evaluation survey for that session. Please select 'continue' to be taken directly to the evaluation.
- At the end of the series, participants receiving a certificate of completion will be asked to complete a more in-depth survey focusing on the training series as a whole.
- We sincerely appreciate your feedback!

Presenters

Morgan Rumble-Whiting



Elizabeth Scaife



Learning Objectives

Review key components to sustainability including funding development, strategic planning, effective programming, monitoring and evaluation.

Evaluate and differentiate proactive and reactive approaches to agency activities.

Discuss assessment results and how they will inform the development of a 3-year strategic plan.

Pre-training Discussion



Assessments
and readings



Jamboard



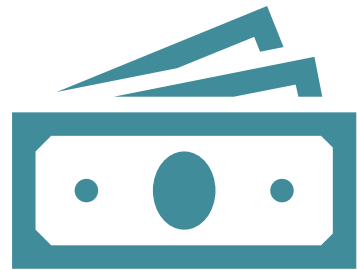
What came up for you
after completing the
pre-training activities?

OVC TTAC Organizational Capacity Assessment

Strategy



Funding



Communications



Programs



MEL



Commitment to Evolution

“One can choose to go back toward safety or forward toward growth. Growth must be chosen again and again; fear must be overcome again and again.”

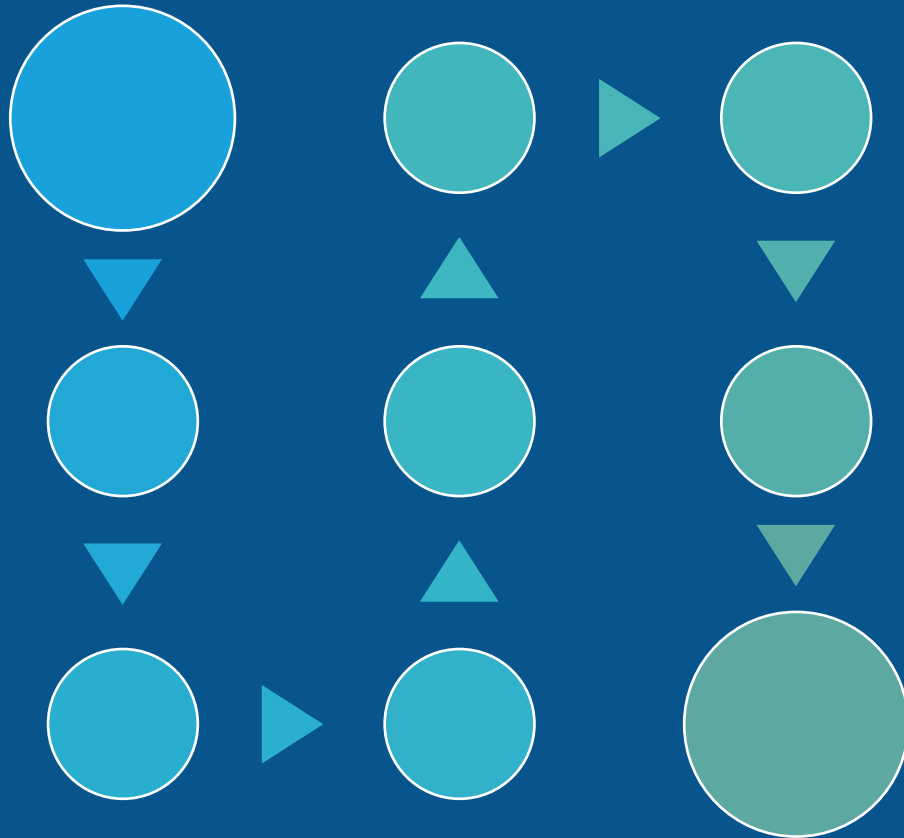
- Alfred Maslow

“We can’t become what we need to be by remaining what we are.”

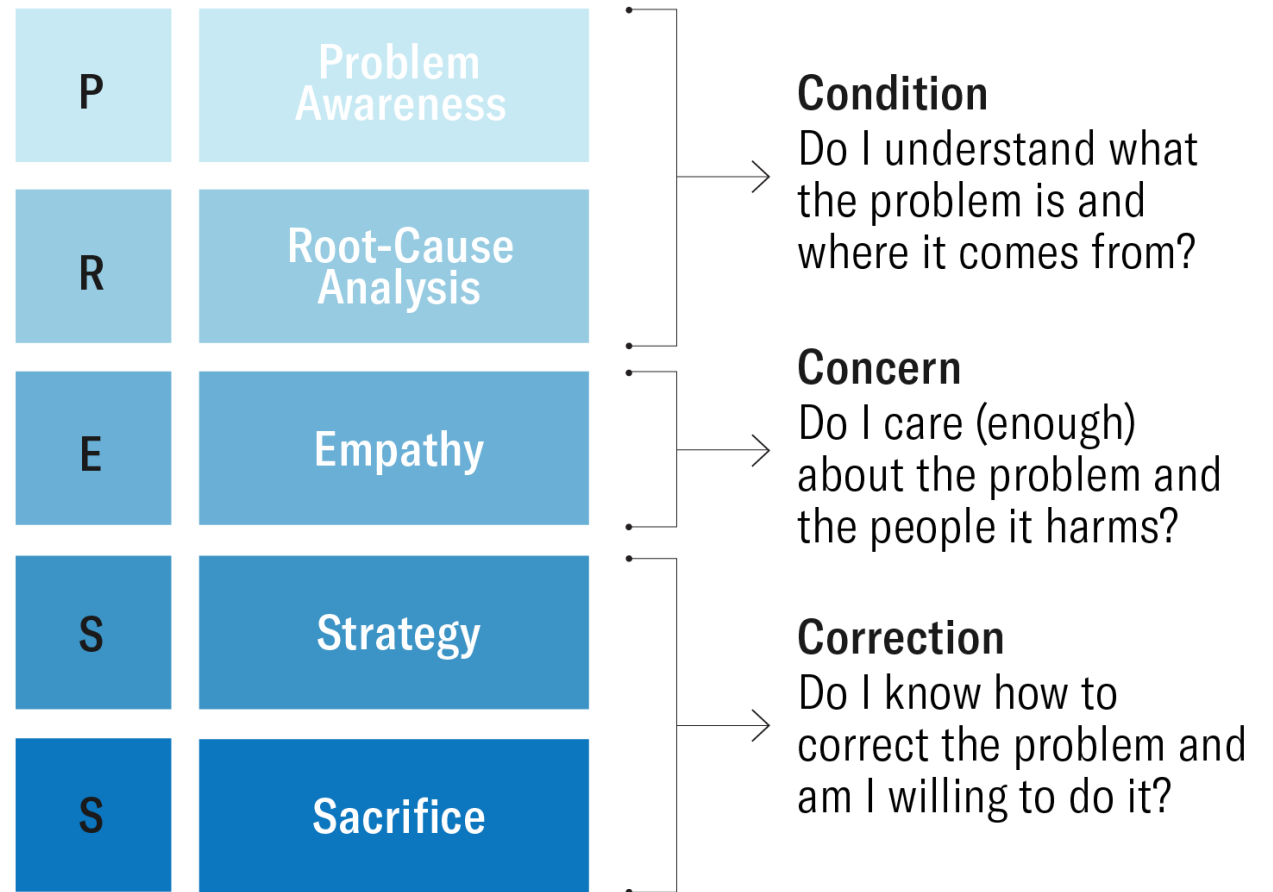
-Oprah Winfrey

Commitment to Evolution

- Metabolize the power of diversity
- Incentivize Intrapreneurship
- Embrace risk and smart failure
- Innovation with 4 steps
 - *Ideas contributed*
 - *Ideas validated*
 - *Ideas piloted*
 - *Ideas scaled*



A Road Map for Racial Equity



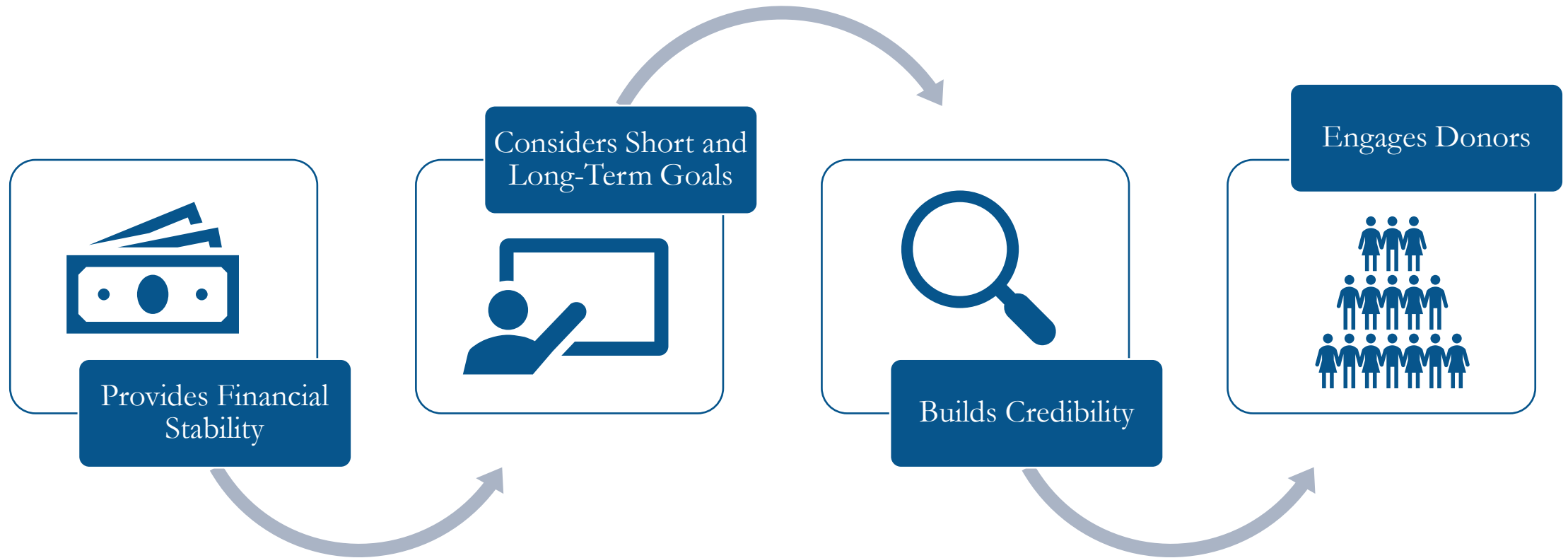
Reimagining Equity Work

Shaundel Spivey

TEDxUWLaCrosse

[PLAY](#)

Funding, Development, Engagement



The Impact of Effective Communications

Please use the Mentimeter link in the chat to access the poll and answer the questions on your computer, phone, or tablet.



The Impact of Effective Communications

- Can support or damage sustainability
- Aligns with overall strategic plan to advance and sustain the organization
- Conveys relevant details and builds engagement with a variety of target audiences
- Keeps staff informed and equipped to be ambassadors of the program/organization
- Honors the contributions of all individuals and inspires more giving

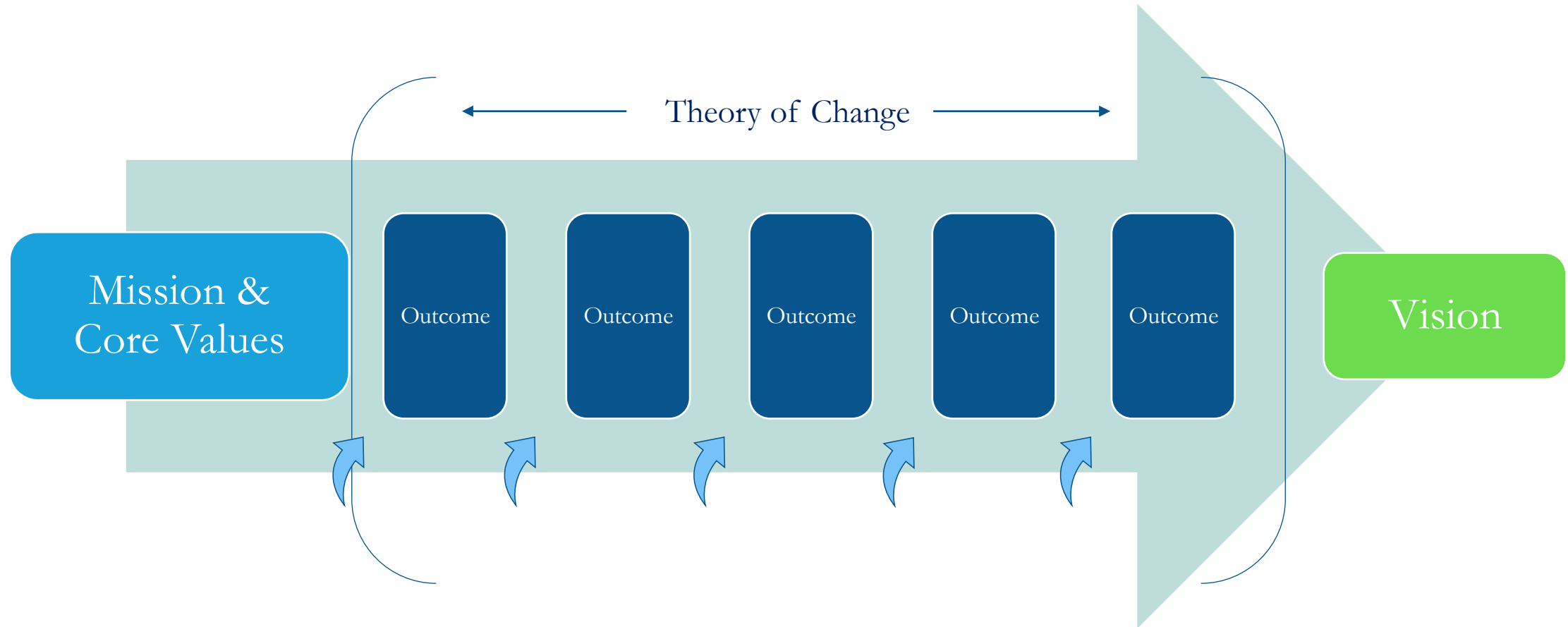


Program Design

- Responds to relevant community needs
- Evidence-based, client-centered
- Trauma-informed, culturally-responsive
- Flexible and adaptable
- Informed by participants/clients
- Supported by trained and skilled staff
- Does not compromise quality of services for clients or quality of life for staff



The Role of Strategy in Sustainability



This is your strategic plan!

- Do you have a 3-year strategic plan for your organization?
- Do you create an annual or 1-year strategic plan for your organization?
- Does each of your programs or departments have their own strategic plan?
- Do you have a strategic plan that aligns with your grant funding?
- How often do you meet with staff to discuss your overall strategy?
- Does your board review or support your strategic planning process?

Strategic Planning Practices

1. How do each of your programs, projects, and initiatives support your mission? Define all of them and describe how they support your goals.
2. How do you evaluate the effectiveness of each of your programs, projects, or initiatives? What methods or metrics are you using?
3. Do you have a development plan? If so, who does it target and how do you measure its effectiveness?
4. What communications strategies are you using and who do they target? Do you currently evaluate your ROI for marketing/communications?

Q: What challenges or obstacles are preventing you from creating and implementing an annual strategic plan?

Please use the Mentimeter link in the chat to access!

Rewards

- Clarity for staff, board, funders
- Anticipate and prepare for challenges/opportunities
- Everything scales together in alignment
- Builds sustainability

Consequences

- Lack of engagement from all
- Remain reactive and stressed
- Lack of alignment
- Reduces your sustainability potential

Monitoring, Evaluation, Learning

“What does success look like?”

What will be evaluated?



What criteria will judge performance?



What standards equal success?



What evidence connects criteria and performance?



What are the conclusions?



Breakout Rooms

1. Assign a note-taker/reporter
2. What program, project or initiative is most important to the success of your mission?
3. How are you evaluating its effectiveness?
4. Do you incorporate surveys for staff or client feedback in your evaluations? How do you ensure the environment is safe to get honest feedback ?
5. How does the evaluation inform the program's development?

Report Back



Of the sustainability pillars we discussed today, which area is your strongest?

Which is your weakest?

Next Session

Session 3: Initiating the Strategic Planning Process

- **Date:** Tuesday, April 25
- **Time:** 2:00–3:45 p.m. ET
- **Link:** Please use the link provided in your series materials to access this session.

Evaluation Reminder

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