**Iowa Partnerships for Success**



County Sustainability Plan Template

Iowa Department of Public Health,

Division of Behavioral Health

August 2018



**Sustainability Success**

According to SAMHSA’s CAPT, in their online course, Prevention SustainAbilities: Planning for Success, “In the context of preventing substance misuse, sustainability is the capacity of a community to produce and maintain positive outcomes after initial funding ends and over time. Like all prevention efforts, sustainability *success* requires careful *planning*.” They go on to say:

*Sustainability success in prevention requires deliberate planning at the local level. This involves:*

* ***Getting ready****—integrating sustainability throughout the strategic planning process, capturing lessons learned about prevention practices, and forming a dedicated sustainability planning team.*
* ***Setting sustainability goals****—critically examining current prevention practices, including both processes and interventions, and determining which to sustain.*
* ***Selecting fiscal strategies****—identifying the essential resources needed to achieve sustainability goals and selecting feasible long- and short-term ways to secure those resources.*
* ***Developing a communication plan****—determining how to communicate most effectively with potential supporters to move fiscal strategies forward and secure essential resources.*
* ***Working the plan over time****—monitoring and updating key partners about sustainability progress, responding to changing needs and opportunities, and celebrating successes—both large and small!*

Planning for sustainability also includes a focus not only on sustaining successful interventions and positive outcomes, but sustaining an effective strategic planning process. In the case of Iowa Partnerships for Success this planning process is the Strategic Prevention Framework. Therefore, sustainability planning will include thoughtful planning for how you will sustain key elements and successful efforts for each of the five SPF steps (assessment, capacity, planning, implementation, and evaluation) in a culturally competent manner.

**Part One: Template Instructions**

Use this template to create the IPFS County Sustainability Plan. The Tools/worksheets within the template were provided by the Centers for the Application of Prevention Technologies (CAPT) during the April 2018 Contractors Conference, so work may have already started on them. The completed Tools/worksheets will be useful in completing all parts 1-7 of the plan. Additional details and information for each part of the Sustainability Plan follows:

* Utilize the coalition, Collaboration Council, or a subcommittee to complete this template.
* Participate in the overview webinar regarding this template. Additional details will be posted on the IPFS Workstation. The webinar will be recorded and can be shared with members who are assisting with the completion of this template.
* Do not revise this template (e.g., change the template format or font, move or remove pages, etc.).
* Answer all of the questions in the order they are asked.
* Abide by the page limit guidance.
* Submit the Tools/worksheets with the completed sustainability plan (there is no Tool 10 within the template).
* Identify at least two current IPFS strategies to sustain the SPF process after the grant ends. The media campaign cannot be one of the two sustained strategies. If your coalition/Collaborative Council would like to sustain the media campaign you can add that as an additional strategy (in addition to the two sustained strategies required).
* Contact Julie Hibben, Janet Nelson or Clare Jones with any questions prior to the deadline.
* Submit this plan to Julie Hibben by October 31, 2018 via Iowagrants.gov correspondence and cc Janet Nelson.

**SAMHSA’S CENTER FOR THE APPLICATION OF PREVENTION TECHNOLOGIES**

Prevention Sustain*Abilities*:Planning for Success

Sustainability Planning Checklist

**Getting Started**

* + Attend the IDPH Sustainability Overview webinar on August 9 from 10:00-11:30 by registering here <https://captconnect.edc.org/event/13096>
	+ Attend Review and Discussion webinars
		- August 23 – Tools and Review and Discussion – from 1:30-2:30

<https://zoom.us/j/876210931>

1-669-900-6833

Meeting ID: 876 210 931

* + - September 6 – Parts 1-4 Review and Discussion – from 10:00 – 11:00

<https://zoom.us/j/876210931>

1-669-900-6833

Meeting ID: 876 210 931

* + - September 19 – Parts 5-7, Contributors and Summary Review and Discussion – from 10:00-11:00

<https://zoom.us/j/876210931>

1-669-900-6833

Meeting ID: 876 210 931

* + Develop a shared understanding of sustainability with your full prevention task force.
	+ Engage in a collaborative, culturally competent, and data-driven SPF process.
	+ Capture lessons learned about prevention practices throughout the SPF process.
	+ Form a small sustainability planning team.

**Setting Sustainability Goals**

* + Establish guidelines for examining prevention processes and interventions.
	+ Gather information and document lessons learned about *processes*.
	+ Gather information and document lessons learned about *interventions*.
	+ Apply lessons learned from this analysis to draft sustainability goals.
	+ Share and finalize sustainability goals with your full prevention task force.

**Selecting Fiscal Strategies**

* + Write concrete objectives for each sustainability goal.
	+ Identify personnel and non-personnel resources required for *each goal*.
	+ Identify overarching resources required *across goals*.
	+ Project costs for all required resources.
	+ Record projected costs in a sustainability budget.
	+ Select feasible *long-term strategies* to secure resources and cover costs.
	+ Select feasible *short-term strategies* to secure resources and cover costs.

**Developing a Communication Plan**

*Preparation*

* + Create a two-phased Communication Plan for moving fiscal strategies forward.
	+ Create a case statement to support all communication efforts.

*Phase 1: Exploration*

* Identify initial contacts for each potential source of support.
* Determine who will talk to each contact.
* Develop contact-specific talking points to guide and support each conversation.
* Hold exploratory conversations with each contact.
* Record key findings from each conversation.

*Phase 2: The “Ask”*

* + Determine how, and to whom, to make each “Ask.”
	+ Determine who will take the lead on moving each “Ask” forward.
	+ Prepare and make formal requests for support.
	+ Record results and next steps from each “Ask.”

**Working the Plan Over Time**

* Monitor the progress of ongoing sustainability efforts.
* Provide regular sustainability updates to your full prevention task force.
* Revise your plan, as needed, to reflect changing needs and opportunities.
* Acknowledge and celebrate sustainability successes, both large and small!

**Part One: STRATEGIC PREVENTION FRAMEWORK ELEMENTS TO BE SUSTAINED**

This section will provide a description of the aspects of the SPF process which are sustainable and the current capacity to sustain identified outcomes achieved through the SPF process within the county.

1. **How will sustainability of a data-driven county planning process be ensured? (page limit: one and half pages)**
2. **How will the county sustain and grow prevention capacity? (page limit: two pages)**
3. **How will the county sustain continued strategic planning? (page limit: one page)**
4. **How will the county ensure effective implementation, continued administrative structures and formal partnerships to sustain prevention outcomes? (page limit: one page)**
5. **How will the county continue to evaluate and monitor prevention outcomes? (page**

**limit: one page)**

1. **How will the county ensure cultural competence-related policies exist? (page limit: one page)**

**Part Two: STRATEGIC PREVENTION FRAMEWORK OUTCOMES TO BE SUSTAINED**

*This section will provide a justification for an identified outcome that can be linked to the strategies implemented by the county.*

**Coalition Efforts (page limit: one page):**

**Pending Items (page limit: half page to one page):**

**Criteria to help determine which strategies to continue (page limit: one page):**

**Strategy Selection (page limit: half page):**

**Linking effort to outcomes (page limit: include the chart below):**

|  |  |  |
| --- | --- | --- |
| **Selected Strategy** | **Process Data** | **Outcome Data** |
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**Part Three: STRATEGIC COLLABORATIONS AND PARTNERSHIPS**

*Answer the following questions and provide response in narrative form below* **(page limit: one page)***:*

**What will the partners, collaborators and IPFS countywide coalition/Collaboration Council need to support each strategy and positive outcomes after IPFS funding ends?**

**What partners have not yet been engaged in the IPFS project that could help sustain each selected strategy and positive outcomes after IPFS funding ends? How will the countywide coalition/Collaboration Council engage these new partners between now and when the IPFS funding ends? (The Capacity Workbook may be helpful in completing these questions).**

**Part Four: RESOURCE ANALYSIS**

*Answer the following questions and provide response in narrative form below* **(page limit: one page)***:*

**Which components of each strategy will the county sustain after IPFS funding ends?**

**What are the specific costs to sustain each strategy and their positive outcome after IPFS funding ends? What resources are available to continue to support each strategy and their positive outcomes after IPFS funding ends?**

**What other kinds of support (in-kind support, funding, donations, etc.) will help sustain each strategy and their positive outcomes after IPFS funding ends?**

**Part Five: SUSTAINABILITY ACTION PLAN**

**FY20 County Sustainability Action Plan**

|  |
| --- |
|  **County Name:**  |
|  **Sustainability Goal: To sustain positive outcomes from the Iowa Partnerships for Success Grant. (Write goal in SMART format)** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Strategy/Positive Outcome to Sustain**  | **Action Steps** | **Timeline** | **Persons Responsible** |
|  |  |  |  |  |
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| --- | --- | --- | --- |
| **Strategy/Positive Outcome to Sustain**  | **Action Steps** | **Timeline** | **Persons Responsible** |
|  |  |  |  |  |
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**Part Six: SUSTAINABILITY COMMUNICATIONS AND MARKETING PLAN**

**Sustainability Communications and Marketing Plan**

|  |  |  |  |
| --- | --- | --- | --- |
| **Audience** | **Communication/****Marketing Tasks** | **Resources Needed or Activated** | **Technologies Used** |
|  |  |  |  |
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**Part Seven: COUNTY SUSTAINABILITY CASE STATEMENT**

 *(Use the Case Study template provided by IDPH)*

**Sustainability Plan Contributors**

*List the names and contributions of those who assisted with establishing this plan.*

|  |  |  |
| --- | --- | --- |
| Name/Sector | Organization | Contribution |
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**Sustainability Plan Process Summary**

*Answer the following questions and provide response in narrative form below* **(page limit: one page)***:*

**Provide a summary of the process you utilized to complete this plan. Be specific in describing how the coalition/Collaborative Council and other key stakeholders were engaged throughout the process. Include meeting dates and details that demonstrate fidelity to the process outlined above.**

Tool 1: process review worksheet

Use this chart to summarize your review of strategic planning processes. Key findings from this review, and from your review of prevention interventions *(see Tool 2)*, will help you set sound sustainability goals for your community *(see Tool 3)*.

|  |  |
| --- | --- |
|  | **Process Guidelines** |
| **SPF Steps** | **What Worked\*** | **What Did *Not* Work\*** | **New Processes Needed\*** | **Task Force Role\*** |
| *Assessment* |  |  |  |  |
| *Capacity* |  |  |  |  |
| *Planning* |  |  |  |  |
| *Implementation* |  |  |  |  |
| *Evaluation* |  |  |  |  |

**\* What Worked:** Identify past processes that helped your community complete key SPF tasks; these processes should be continued.

**\* What Did *Not* Work:** Identify past processes that did *not* help your community complete key SPF tasks; these processes should be improved or discarded.

**\* New Processes Needed:** Identify new processes that will help your community respond to changes and complete key SPF tasks moving forward.

**\* Task Force Role:** Describe your prevention task force’s level of responsibility for sustaining successful processes over time.

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Tool 2: Strategy review worksheet

Use this chart to summarize findings from your review of prevention strategies. Key findings from this review, and from your review of strategic planning processes *(see Tool 1*), will help you set sound sustainability goals for your community *(see Tool 3)*.

|  |  |
| --- | --- |
|  | **Strategy Guidelines** |
| **Strategies** | **Evidence of Effectiveness\*** | **Evidence of Internal Capacity\*** | **Evidence of Community Support\*** | **Task Force Role\*** |
| *Strategy 1: Write your first strategy here.* |  |  |  |  |
| *Strategy 2: Write your second strategy here.* |  |  |  |  |
| *Strategy 3: Write your third strategy here.* |  |  |  |  |
| *Strategy 4: Write your fourth strategy here.* |  |  |  |  |
| *Strategy 5: Write your fifth strategy here.* |  |  |  |  |

**\* Evidence of Effectiveness:** Determine if the strategy is achieving positive prevention outcomes now or moving in the right direction.

**\* Evidence of Internal Capacity:** Determine if the strategy is well equipped with staff, supplies, and space.

**\* Evidence of Community Support:** Determine if the strategy is valued by community leaders, key stakeholders, and the public.

**\* Task Force Role:** Describe your prevention task force’s level of responsibility for sustaining successful strategies over time.

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Tool 3: Setting goals worksheet

Use findings from your process and intervention review charts *(see Tool 1 and Tool 2)* to answer the questions below and set sustainability goals for your community.

|  |  |
| --- | --- |
| **Drafting Process Goals** | **Drafting Intervention Goals** |
| Consider the processes needed to support successful strategic planning. Are these processes firmly established in your community (i.e., a stable community partner is responsible for their continuation)?

|  |  |
| --- | --- |
| YES  | NO |

 | Consider the interventions that meet all of your criteria for success. Are these interventions firmly established in your community (i.e., a stable community partner is responsible for their continuation)?

|  |  |
| --- | --- |
| YES  | NO |

 |
| If you answered **NO** to the question above, draft one or more goals to help ensure the continuation of these processes. | If you answered **NO** to the question above, draft one or more goals to help ensure the continuation of these interventions. |

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Tool 3: Setting goals worksheet (continued)

|  |
| --- |
| Are your drafted goals: YES NO* Based on objective data about what will benefit your community?
* Realistic for your community (typically two or three goals in total)?
 |
| **Obtaining Partner Buy-In** |
| If your drafted goals are both objective and realistic, you are ready to share these goals with your full prevention task force and other key partners. Their early buy-in will help to ensure their support and participation as you work to achieve these goals over time. |
| **Finalizing Sustainability Goals** |
| Once you have the support of your prevention partners, list your community’s finalsustainability goals here.* **Goal 1:**
* **Goal 2:**

* **Goal 3:**

 |

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Tool 4: writing objectives worksheet

List your final sustainability goals *(see Tool 3)* in the chart below. Then, for each goal, write a set of objectives that are *essential* (address only activities that are fundamental to achieving the goal), *specific* (include clear language and concrete, measurable details such as numbers and time frames), and *realistic* (reasonable and achievable).

|  |  |
| --- | --- |
| **Sustainability Goals** | **Objectives** |
| *Goal 1: Write your first goal here.* | *
*
*
 |
| *Goal 2: Write your second goal here.* | *
*
*
 |
| *Goal 3: Write your third goal here.* | *
*
*
 |

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Tool 5: identifying resources worksheet

List your sustainability goals and objectives *(see Tool 4)* in the chart below. Then use your objectivesto identify the essential resources you will need that are *specific to each goal*. Finally, identify any overarching resources that will be *shared across goals.*

|  |  |
| --- | --- |
| **Sustainability Goals**  | **Required Resources** |
|  | **Personnel\*** | **Non-personnel\*** |
| *Goal 1: Write your first goal here.** *Write your first objective here.*
* *Write your second objective here.*
* *Write your third objective here.*
 |  |  |
| *Goal 2: Write your second goal here.** *Write your first objective here.*
* *Write your second objective here.*
* *Write your third objective here.*
 |  |  |

**\* Personnel** includes all of the people who will do the work required to meet objectives and achieve goals, such as staff and consultants.

**\* Non-personnel** includes everything people will need to do the work well, such as professional development, related travel, supplies, and meeting space.

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Tool 5: identifying resources worksheet (continued)

|  |  |
| --- | --- |
| **Sustainability Goals** | **Required Resources** |
|  | **Personnel\*** | **Non-personnel\*** |
| *Goal 3: Write your third goal here.** *Write your first objective here.*
* *Write your second objective here.*
* *Write your third objective here.*
 |  |  |
| *All Goals**Consider overarching administrative, evaluation, and fundraising resources that will help support all goals.* |  |  |

**\* Personnel** includes all of the people who will do the work required to meet objectives and achieve goals, such as staff and consultants.

**\* Non-personnel** includes everything people will need to do the work well, such as professional development, related travel, supplies, and meeting space.

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Tool 6: projecting costs worksheet

List the personnel and non-personnel resources required to achieve your goals *(see Tool 5)* in the chart below. Then project the costs associated with each resource. Work with a budget expert to ensure accuracy and record final numbers in your sustainability budget.

|  |  |
| --- | --- |
| **Required Resources** | **Projected Costs** |
|  | **Minimum Quantity Needed\*** | **Dollar Value\*** | **TOTALS\*** |
| *Goal 1** **Personnel:** *List essential staff and consultant roles here.*
* **Non-personnel:**  *List essential professional development, travel, supplies/equipment, space/facilities, etc., here.*
 |  |  |  |
| *Goal 2** **Personnel:** *List essential staff and consultant roles here.*
* **Non-personnel:**  *List essential professional development, travel, supplies/equipment, space/facilities, etc., here.*
 |  |  |  |

**\* Minimum Quantity Needed:** Hours per week and weeks per year personnel will work, number of training sessions, number of program facilitator guides, etc.

**\* Dollar Value:** Salaries or hourly rates for personnel, fees associated with staff benefits, training or coaching fees, costs of program facilitator guides, etc.

**\* TOTALS:** Minimum quantity needed X dollar value; for example, 20 program facilitator guides X $15/guide = $300.

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Tool 6: projecting costs worksheet (continued)

|  |  |
| --- | --- |
| **Required Resources** | **Projected Costs** |
|  | **Minimum Quantity Needed\*** | **Dollar Value\*** | **TOTALS\*** |
| *Goal 3** **Personnel:** *List essential staff and consultant roles here.*
* **Non-personnel:**  *List essential professional development, travel, supplies/equipment, space/facilities, etc., here.*
 |  |  |  |
| *All Goals**Consider overarching administrative, evaluation, and fundraising resources that will help support all goals.* |  |  |  |

**\* Minimum Quantity Needed:** Hours per week and weeks per year personnel will work, number of training sessions, number of program facilitator guides, etc.

**\* Dollar Value:** Salaries or hourly rates for personnel, fees associated with staff benefits, training or coaching fees, costs of program facilitator guides, etc.

**\* TOTALS:** Minimum quantity needed X dollar value; for example, 20 program facilitator guides X $15/guide = $300.

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Tool 7: exploring feasibility worksheet

Use this worksheet to explore the feasibility of different strategies for securing the required resources and covering the projected costs associated with your sustainability goals *(see Tool 6).* First consider *long-term* strategies, then consider *short-term* strategies*.* Brainstorm all possible options here, then refer to this information to make your final selections *(see Tool 8)*.

|  |  |
| --- | --- |
| **Long-Term Fiscal Strategies** | **Feasibility** |
|  | **Good fit for . . . \*** | **Viable partners include . . . \***  |
| Securing a line item in an existing budget |  |  |
| Promoting the adoption of programs/services |  |  |
| Changing community guidelines |  |  |
| Other: *List any other strategies that could help you secure stable or recurring access to resources/ revenue and serve as long-term solutions for sustaining successful prevention practices.* |  |  |

**\*Good fit for . . . :** Consider whether the fiscal strategy can help you secure any required resources or cover any projected costs. If so, indicate which one(s).

**\*Viable partners include . . . :** For each good-fit strategy, list any potential partners who may be willing and able to deliver what you need.

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Tool 7: exploring feasibility worksheet (continued)

|  |  |
| --- | --- |
| **Short-Term Fiscal Strategies** | **Feasibility** |
|  | **Good fit for . . . \*** | **Viable partners include . . . \***  |
| Soliciting in-kind support |  |  |
| Applying for grants |  |  |
| Earning/raising money (e.g., membership dues, fees for services, fundraisers, donations)  |  |  |
| Other: *List any other strategies that could help you secure limited or temporary access to resources/revenue and keep successful prevention practices afloat while you work toward long-term sustainability solutions.* |  |  |

**\*Good fit for . . . :** Consider whether the fiscal strategy can help you secure any required resources or cover any projected costs. If so, indicate which one(s).

**\*Viable partners include . . . :** For each good-fit strategy, list any potential partners who may be willing and able to deliver what you need.

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Tool 8: selecting strategies worksheet

List your sustainability goals in the chart below. Then consider the feasibility of different fiscal strategies *(see Tool 7)* and select a set of long- and short-term strategies for achieving your sustainability goals.

|  |  |
| --- | --- |
| **Sustainability Goals** | **Feasible Fiscal Strategies** |
|  | **Resources/Revenue\*** | **Potential Sources of Support\*** |
| **Goal 1:** *Write your first goal here.* | **Long-Term** |  |  |
|  | **Short-Term** |  |  |
| **Goal 2:** *Write your second goal here.* | **Long-Term** |  |  |
|  | **Short-Term** |  |  |

**\* Resources/Revenue:** Identify the specific type of support you intend to pursue (e.g., budgetary line item, grant, donated goods or services). **\* Potential Sources of Support:** Identify the person, group, or agency from whom you intend to request support.

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Tool 8: selecting strategies worksheet (continued)

|  |  |
| --- | --- |
| **Sustainability Goals** | **Feasible Fiscal Strategies** |
|  | **Resources/Revenue\*** | **Potential Sources of Support\*** |
| **Goal 3:** *Write your third goal here.* | **Long-Term** |  |  |
|  | **Short-Term** |  |  |
| **All Goals** *Consider overarching resources and costs associated with all goals (e.g., administrative, evaluation, fundraising).*  | **Long-Term** |  |  |
|  | **Short-Term** |  |  |

**\* Resources/Revenue:** Identify the specific type of support you intend to pursue (e.g., budgetary line item, grant, donated goods or services). **\* Potential Sources of Support:** Identify the person, group, or agency from whom you intend to request support.

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Tool 9: communication plan template

List the resources/revenue and potential sources of support associated with your fiscal strategies *(see Tool 8)* in the chart below. As you move each strategy forward, record your key decisions, findings, and progress.

|  |  |  |
| --- | --- | --- |
| **Fiscal Strategies** | **Phase 1: Exploration** | **Phase 2: The “Ask”** |
| **Resources/Revenue** | **PotentialSources** | **Contacts** | **Who Is Responsible?** | **Findings** | **“Ask” Strategies** | **Required Materials** | **DueDates** | **Who IsResponsible?** | **Results and Next Steps** |
| *Specific type of support you intend to pursue (e.g., budgetary line item, grant, donated goods or services)* | *Person, group, or agency from whom you intend to request support* | *Person with information and insights about the potential source of support* | *Person who will talk to the initial contact* | *Is the potential source of support a good fit? If so, what’s the best way to proceed?* | *How, and to whom, to make your formal request for resources/revenue* | *Materials for making the request (e.g., written letters or proposals, PowerPoint slides, talking points)* | *Completion and submission deadlines* | *Person who will lead the work and people who will help complete the work* | *Has the request been granted/denied? Is follow-up required?*  |
|  |  |  |  |  |  |  |  |  |  |
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