Achieving Organization Sustainability: Recommendations from the Literature

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Context

• To continue implementing the WHO FCTC, it is important for tobacco control organizations to remain sustainable

• Definition of sustainability: Sustainable organizations are vibrant organizations with sufficient infrastructure and operations & planning, leadership, and collaboration that allow continuation of day-to-day work despite future uncertainties

• Purpose of our review was to synthesize the literature regarding tools that may assist organizations in remaining sustainable
Review of the Literature

1. A review of the white and grey literature was conducted during 2016 to identify sustainability-related reports and tools.

1. Twelve search terms were utilized: Non-profit sustainability, philanthropy sustainability, program sustainability, organization sustainability, partnership sustainability, initiative sustainability, philanthropy exit strategies, philanthropy legacy, foundation legacy, philanthropy exit strategies, phase-over foundations, and venture philanthropy.

2. Additional reports were identified using references from key reports.

1. Final review included 16 sustainability reports and tools.
Organization Infrastructure and Operations

• Organization infrastructure and operations impact success

• How developed infrastructure and operations are may depend on the maturity of organizations
  • Start up vs. organization with 20 years of experience

• Identified tools meant to categorize the maturity level of organization infrastructure and operations and provide strategies for either reaching the next stage of maturity or maintaining maturity
  • The Speakman Management Consulting’s Tools:
    • Nonprofit Organizational Life Cycle
    • Keys to Life Cycle Transitions
# Organization Infrastructure and Operations

## Nonprofit Organizational Life Cycle

<table>
<thead>
<tr>
<th>Invention</th>
<th>Start-Up</th>
<th>Growth</th>
<th>Sustainability</th>
<th>Stagnation-and-renewal</th>
<th>Decline-and-shutdown</th>
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| • Extremely informal or not yet a concern  
• Perceived need for a program or service | • Simple programs are initiated or a mix of diverse and non-integrated activities  
• Strong commitment to delivering services | • Programs begin to establish themselves in the market  
• Often demand is greater than capacity  
• More consistent program delivery  
• More focus | • Core programs are established and recognized in the community  
• Long range program planning  
• New programs are added & deleted as market dictates  
• Programs functioning well | • Organization loses sight of market  
• Programs developed primarily to attract funding  
• Difficulty in delivering services and reaching goals  
• Inconsistent program quality | • No longer meeting market needs  
• Loss of credibility with funders and clients  
• Decline in product quality  
• Major reduction in referrals  
• Licensing or accreditation in jeopardy |

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<th>Other Infrastructure and Operations covered:</th>
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| • Staffing  
• Governance/Board  
• Administrative Systems/Operations |
| • Management  
• Finances and Fundraising  
• Marketing/Community Awareness |

Scan the QR codes on each slide to view and save each tool 😊
### Organization Infrastructure and Operations

#### Keys to Life Cycle Transitions

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<tr>
<td>• Identify key unmet client/community needs</td>
<td>• Assess and begin to improve quality</td>
<td>• Develop a strategic plan to clarify &amp; integrate</td>
<td>• Explore new program delivery models</td>
<td>• Undertake strategic planning to review activities – reduce and focus efforts</td>
<td>• Reduce programs to core essence</td>
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<tr>
<td>• Develop a concept plan</td>
<td>• Establish criteria for what activities and programs to pursue</td>
<td>• ID and track client outcomes</td>
<td>• Develop internal process for evaluating new opportunities</td>
<td>• Conduct formal program evaluation – survey clients</td>
<td>• Explore partner to transfer programs</td>
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<td>• Identify and evaluate program options</td>
<td>• Learn to say ‘no’ to opportunities</td>
<td>• Develop collaborations to better serve client needs</td>
<td>• Review strategic plan &amp; develop a long-range program plan</td>
<td>• Explore best practices and models</td>
<td>• Immediately improve quality</td>
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<td>• Clarify results &amp; expectations of work</td>
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#### Other Infrastructure and Operations covered:

- Staffing
- Governance/Board
- Administrative Systems/Operations
- Management
- Finances and Fundraising
- Marketing/Community Awareness

Both Speakman Management Consulting tools are in the same document
Planning, Leadership, and Collaboration

- Planning, leadership, and collaboration may also be required to achieve long-term goals.

- Objective, early, and periodic assessment of an organization’s planning, leadership, and collaboration, and implementing strategies to address any gaps, may improve the likelihood of an organization surviving known or unknown threats.

- Identified tools to assess an organization’s “sustainability readiness” and provide direction on implementing strategies to address gaps.
  - Washington University in St. Louis & Center for Public Health Systems Science’s Program Sustainability Assessment Tool (PSAT)
Planning, Leadership, and Collaboration

Building Sustainable Programs: The Framework and Resource Guide

How to use DHHS resources:
1. Framework
2. Assessment
3. Use Resource Guide
Planning, Leadership, and Collaboration

Program Sustainability Assessment Tool (PSAT)

Environmental Support
Funding Stability
Partnerships
Communications
Organizational Capacity
Program Adaptation
Program Evaluation

How to use PSAT resources:
1. Understand  1. Review
2. Assess       2. Plan
Other Findings...

• Donors cannot be expected to provide support indefinitely

• Plan for future donor exits
  • Leverage current donor support to implement sustainability strategies
  • Anticipate the impact of losing a donor’s brand
Conclusions
Summary & Recommendations

• Organization infrastructure and operations & planning, leadership, and collaboration are vital areas of organizational sustainability

• Multiple tools exist to help tobacco control organizations learn, self-assess, review, and create an action plan for improving sustainability

• Objective, early, and periodic assessment using one or a combination of these tools may increase the chances a tobacco control organization can become or remain a vibrant organization despite future threats to viability

• Review the tools presented today and determine which are most appropriate for you 😊
Q&A

Infrastructure and Operations Tools

PSAT Resources

DHHS’ Framework

DHHS Resource Guide
References


