

**SUSTAINABILITY
TRAINING
INSTITUTE**

Building Capacity

to assure
the future
of promising
initiatives

Providing training
in how to create
and support effective
sustainability plans
for initiatives
serving children,
families, and
communities



The **FINANCE**
PROJECT

TRAINING OVERVIEW

Many leaders of promising initiatives and agencies struggle to marshal the range of resources critical for their long-term success. The Finance Project's **Sustainability Training Institute** provides participants with the knowledge, tools, and skills they need to develop and support effective sustainability plans for initiatives that serve children, families and communities.

Sustainability planning is a complex and challenging process. Through the Training Institute, we provide in-depth and specialized training that prepares participants to meet these challenges and to successfully undertake or support a sustainability planning process.

Typical trainings include:

- An introduction to The Finance Project's sustainability framework and approach
- Guidance in how to get started in the planning process—who to have at the table and how to structure and manage the process
- In-depth orientation to the tools and worksheets in the **Sustainability Planning Workbook**
- Step-by-step instruction in how to facilitate each stage of the planning process
- Practice applying planning tools through case studies and interactive exercises
- Guidance in how to adapt and tailor the tools and methods to fit individual needs and goals

We develop each training design in close consultation with our clients to ensure it meets their individual needs and priorities.

**SUSTAINABILITY
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Building Capacity to assure the future of promising initiatives

Through the **Sustainability Training Institute**, The Finance Project offers a range of specialized training services to meet the unique needs of each client we serve. Training services can be combined in a variety of ways based on needs and priorities.

Training for Facilitators

Sustainability planning can be a complex process to undertake. Based on our field experience, we have found that the process yields greater results if it is supported by a trained facilitator. The Finance Project provides in-depth training sessions that prepare participants to lead or facilitate a sustainability planning process. Participants have included local technical assistance providers, organizational leaders, and public and private funders.

Our two-day facilitator trainings are highly interactive and provide participants the opportunity to test out The Finance Project's tools and approaches. We develop customized case exercises to support learning based on the unique needs of each client. During the training, participants role play facilitating a mock sustainability planning process. Finance Project trainers also provide guidance in how to adapt the Workbook process for a range of different users and circumstances.

“The planning process demonstrates a clear path for determining where an organization is and what they need to do to reach their goals.”

—*Center for Schools
and Communities, PA
participant*



Training for Users—

Program Leaders and Grantees


The Finance Project also provides training for program leaders and grantees interested in sustainability planning. These trainings provide customized assistance for participants in designing and undertaking a planning process.

Trainings include an introduction to The Finance Project's sustainability tools and methods, team time to work through key questions and complete initial steps in the process, and structured peer learning opportunities. Participants typically attend the training in teams of three to five members.

These two-day trainings can be delivered concurrently or at conveniently spaced intervals based on local needs and priorities. The Finance Project creates training designs that includes both facilitators and users trainings in which local technical assistance providers are paired with community teams during the training.

Training for Individuals

The Finance Project also offers trainings to the general public for individuals interested in increasing their knowledge and skills related to sustainability planning. These trainings are patterned on our facilitators and users trainings and prepare participants to undertake or support sustainability planning efforts. Information on upcoming trainings can be found on The Finance Project's web site at: www.financeproject.org/training.



“It really got me thinking about new ideas”

—KY 21st CCLC participant



Follow-Up Coaching and Support

The Finance Project offers a variety of on-going support services for training participants, including:

- **Follow-Up Trainings** to help participants work through the real world challenges they faced in facilitating sustainability planning processes, provide guidance on adapting the tools and process, and provide opportunities for peer exchange and learning.
- **On-Going Coaching** for facilitators by Finance Project staff through regular phone conversations and on-site support.
- **Web-Based Training Resources** that include examples of local adaptations, bulletin boards to post questions, and facilitated discussion of best practices in sustainability planning.
- A **“Help Desk”** that is staffed by experienced coaches available to provide one-on-one support for dealing with challenges as they arise during a planning process.

Training Outcomes

The Finance Project provides training for a wide variety of initiatives and organizations serving children, families and communities, including out-of-school time, early care and education, child welfare, education reform, community development, and comprehensive community services. For a list of our training clients, visit our web site at www.financeproject.org/training.

“The case exercises were excellent and really allowed me to experience the process.”


—PlusTime NH participant

“Having the time to work through a structured process with my colleagues was invaluable.”

—Bay Area Partnership participant

Participants in the **Sustainability Training Institute** consistently report that our:

- Trainings are well-organized and easy to follow;
- Tools and materials are relevant and useful;
- Staff are experienced and knowledgeable;
- Trainings are interesting and engaging; and
- Trainings prepared them to facilitate the development of a practical and realistic sustainability plan.



“The materials were wonderful! The level of detail provided was extraordinary.”

—Hillsborough County, FL
training participant

About The Finance Project

The Finance Project is a specialized non-profit research, consulting, technical assistance, and training firm for public and private sector leaders nationwide. We help our clients make smart investment decisions, develop sound financing strategies, and build solid partnerships that benefit children, families and communities.

The **Sustainability Training Institute** is staffed by highly qualified trainers, all of whom have successfully facilitated numerous sustainability planning processes with a wide range of clients. The on-the-ground experience of our trainers provides unmatched capabilities and expertise in the field of financing and sustainability.

For More Information

For additional information about The Finance Project’s training services or to schedule training, please contact Barbara Langford, Director of the **Sustainability Training Institute**, at 202.587.1000.

THE SUSTAINABILITY PLANNING WORKBOOK

The Finance Project's **Sustainability Planning Workbook** is the foundation for our training services. The Workbook helps users clarify their vision, identify key issues in sustaining their work and develop strategies to achieve their long-term goals. The Workbook is organized into five modules that guide users through a step-by-step process of developing a written sustainability plan:

1. **Building a Sustainable Initiative**—introduces a framework for sustainability and guides users through a self-assessment process.
2. **Creating a Vision and Results Orientation**—helps clarify long-term goals and establish benchmarks for measuring progress.
3. **Developing a Strategic Financing Plan**—guides users in creating a plan to secure the fiscal resources needed to accomplish long-term goals, including determining cost estimates, identifying funding gaps, and developing financing strategies.
4. **Building Community Support and Organizational Capacity**—helps in identifying the range of sustainability strategies, including building broad-based community support, cultivating key champions, and developing strong internal systems to manage and govern effectively.
5. **Writing a Sustainability Plan**—guides users in drafting a written plan that outlines major strategies and implementation steps in a clear and compelling way.

The Finance Project developed the **Sustainability Planning Workbook** based on a decade of field experience helping a wide range of organizational and initiative leaders develop effective financing and sustainability plans. The Workbook is widely used by leaders throughout the fields of human services, education, and community development.



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