



Planning for Sustainability

Behavioral Health Recruitment and Retention

September 5, 2023 | 10 a.m.–12:30 p.m. PT
SoCal (Los Angeles) and Southern CA

September 6, 2023 | 10 a.m.–12:30 p.m. PT
Bay Area Mid-State and NorCal and Capital



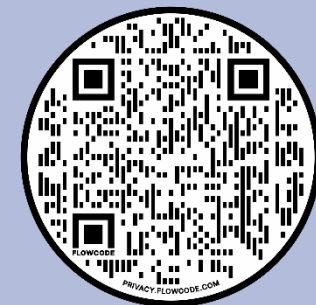
Indigenous Land Acknowledgement

- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.
- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California and in displaying respect, honor, and gratitude for all indigenous people.

Whose land are you on?

Option 1: Enter your location at [Native Land CA](#)

Option 2: Access Native Land website via QR Code





Advocates for Human Potential, Inc. (AHP) BHRR Team



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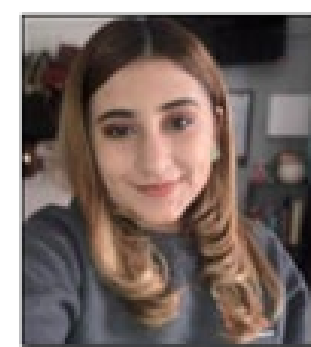
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This project would not be possible without the many amazing people who work in the background but are not on this slide.

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Agenda

1. Overview and Objectives
2. Community Agreements
3. Defining Sustainability
4. PSAT
5. Sustaining BHRR Strategies
6. Workplace Culture
7. Wrap-Up



Objectives

Establish and gain consensus on community agreements to guide conversations during the BHRR grant.

Define and distinguish between program sustainability and organizational viability.

Identify the components of the BHRR funding that require sustainability planning.

Review and begin to explore strategic recruitment and retention thinking, partnerships, and alternative funding options.

Understand and apply PSAT framework to develop sustainability goals.



Community Agreements



Poll - Community Agreement: Defining Our Expectations

Lead with
curiosity

Promote
safety

Be a learner
and a teacher

Look to build
upon others'
thinking

Offer
respect

Try on
new ideas

Seek to
collaborate

Support
change

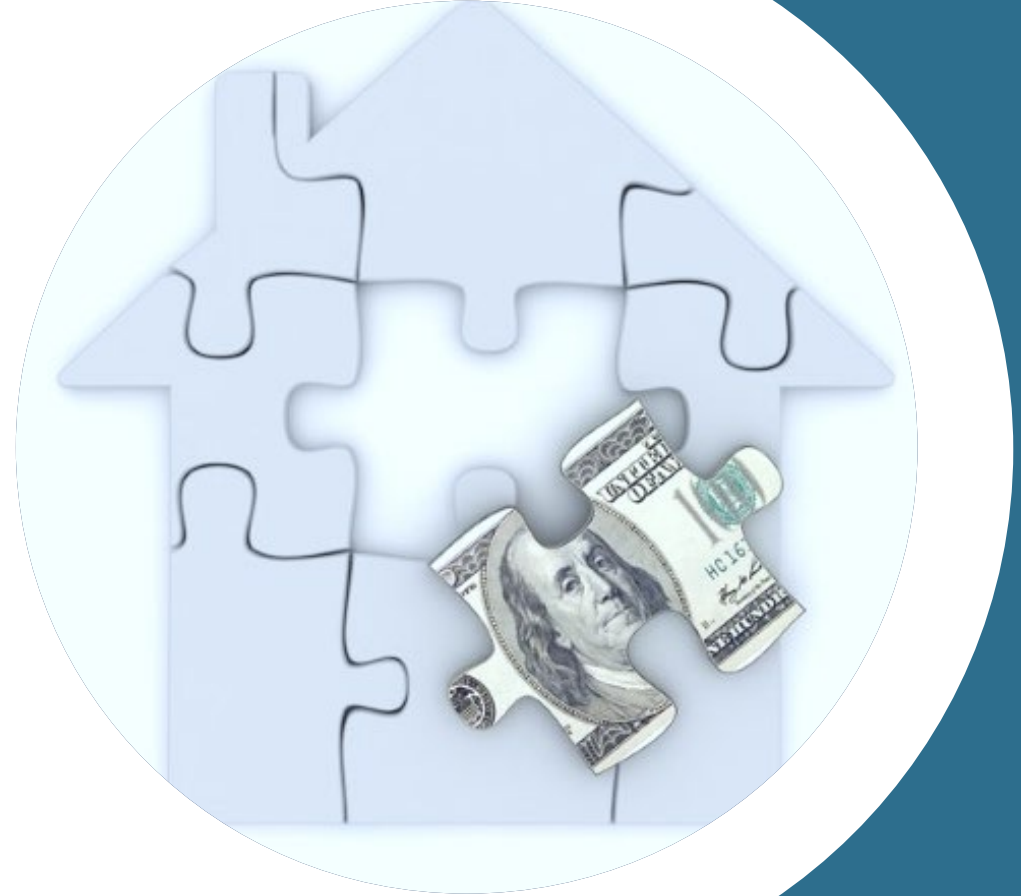
Defining Sustainability



Sustainability vs Viability

Program Sustainability: Strategic planning that enables you to maintain high quality and high impact programs even if a major source of funding is lost.

Organizational Viability: Capacity of an organization to keep their doors open—pay their rent/mortgage, meet payroll, provide benefits, etc.



Program Sustainability Assessment Tool



Program Sustainability Assessment Tool (PSAT)

A 40-question self-assessment tool that rates the sustainability capacity of a program across eight domains by gathering input from staff and stakeholders.

The tool will help you:

- Clarify understanding of a program.
- Consider sustainability strengths and challenges.
- Prioritize where to focus efforts to increase sustainability capacity.
- Build an action plan to strengthen sustainability capacity.

Program Sustainability Assessment Tool (PSAT)



Understand the factors that influence a program's capacity for sustainability.



Assess your program's capacity for sustainability.



Review results from assessment as a sustainability report.



Develop an **Action Plan** to increase likelihood of sustainability.

What You Need to Know

- **Grantees are required to fill out the assessment.**
- **If you are also a grantee on other BHWD projects (PWI, EPOC, or MIP), please only complete the PSAT ONE TIME and inform your Grantee Coach.**
- **We recommend larger organizations choose the “Assess as a group” option and invite multiple staff from different positions and levels at your organization to complete the assessment anonymously.**
- **Once you have your results, there are templates on the website that you can use to create your sustainability plan. According to the BHRR RFA, this is a required activity for all grantees.**
- **Grantees are required to incorporate sustainability goals into the implementation plan (IP). More information on the IP will be provided.**
- **There should be at least one sustainability goal for each strategy chosen.**

Understand



Understand: 8 Domains of Sustainability



Environmental Support

Champions (internal and external) program and uses influence to gain support, funding, and policies that benefit target population.



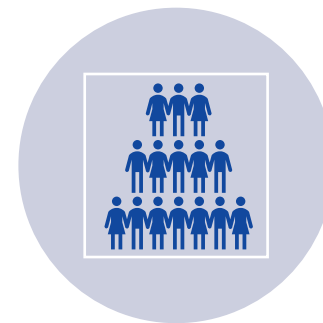
Funding Stability

Strategic, diversified funding addresses long-term program needs. Provides ability to adapt to changing trends that impact funding.



Partnerships

Connects organization to alliances across sectors to champion program, build community support, and access greater resources.



Organizational Capacity

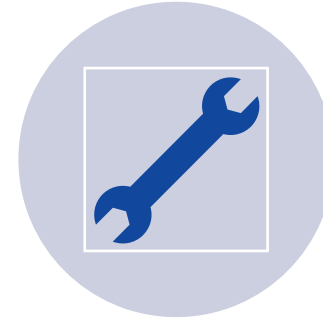
Ensures organization has knowledge, capabilities, and resources to accomplish program goals.

Understand: 8 Domains of Sustainability



Program Evaluation

Monitors progress on goals and outcomes to course correct and collect program success/impact. Supports requests for increased support and funding.



Program Adaptation

Maintains efficient use of resources to sustain effective program components that most benefit target group.



Communications

Externally grows program visibility and builds support from stakeholders. Internally builds staff buy-in and support from leadership.



Strategic Planning

Combines all sustainability domains into outcome-oriented plan that aligns with larger external and organizational environment

Assess and Review



Assess: Environmental Support

Environmental Support: Having a supportive internal and external climate for your program

	To little or no extent		To a very great extent					Not able to answer
1. Champions exist who strongly support the program.	1	2	3	4	5	6	7	NA
2. The program has strong champions with the ability to garner resources.	1	2	3	4	5	6	7	NA
3. The program has leadership support from within the larger organization.	1	2	3	4	5	6	7	NA
4. The program has leadership support from outside of the organization.	1	2	3	4	5	6	7	NA
5. The program has strong public support.	1	2	3	4	5	6	7	NA

Assess: Funding Stability

Funding Stability: Establishing a consistent financial base for your program

	To little or no extent							To a very great extent	Not able to answer
1. The program exists in a supportive state economic climate.	1	2	3	4	5	6	7	NA	
2. The program implements policies to help ensure sustained funding.	1	2	3	4	5	6	7	NA	
3. The program is funded through a variety of sources.	1	2	3	4	5	6	7	NA	
4. The program has a combination of stable and flexible funding.	1	2	3	4	5	6	7	NA	
5. The program has sustained funding.	1	2	3	4	5	6	7	NA	

Assess: Partnerships

Partnerships: Cultivating connections between your program and its stakeholders

	To little or no extent							To a very great extent	Not able to answer
1. Diverse community organizations are invested in the success of the program.	1	2	3	4	5	6	7	NA	
2. The program communicates with community leaders.	1	2	3	4	5	6	7	NA	
3. Community leaders are involved with the program.	1	2	3	4	5	6	7	NA	
4. Community members are passionately committed to the program.	1	2	3	4	5	6	7	NA	
5. The community is engaged in the development of program goals.	1	2	3	4	5	6	7	NA	

Assess: Organizational Capacity

Organizational Capacity: Having the internal support and resources needed to effectively manage your program and its activities

	To little or no extent					To a very great extent		Not able to answer
1. The program is well integrated into the operations of the organization.	1	2	3	4	5	6	7	NA
2. Organizational systems are in place to support the various program needs.	1	2	3	4	5	6	7	NA
3. Leadership effectively articulates the vision of the program to external partners.	1	2	3	4	5	6	7	NA
4. Leadership efficiently manages staff and other resources.	1	2	3	4	5	6	7	NA
5. The program has adequate staff to complete the program's goals.	1	2	3	4	5	6	7	NA

Assess: Program Evaluation

Program Evaluation: Assessing your program to inform planning and document results

	To little or no extent							To a very great extent	Not able to answer
1. The program has the capacity for quality program evaluation.	1	2	3	4	5	6	7	NA	
2. The program reports short term and intermediate outcomes.	1	2	3	4	5	6	7	NA	
3. Evaluation results inform program planning and implementation.	1	2	3	4	5	6	7	NA	
4. Program evaluation results are used to demonstrate successes to funders and other key stakeholders.	1	2	3	4	5	6	7	NA	
5. The program provides strong evidence to the public that the program works.	1	2	3	4	5	6	7	NA	

Assess: Program Adaptation

Program Adaptation: Taking actions that adapt your program to ensure its ongoing effectiveness

	To little or no extent					To a very great extent		Not able to answer
1. The program periodically reviews the evidence base.	1	2	3	4	5	6	7	NA
2. The program adapts strategies as needed.	1	2	3	4	5	6	7	NA
3. The program adapts to new science.	1	2	3	4	5	6	7	NA
4. The program proactively adapts to changes in the environment.	1	2	3	4	5	6	7	NA
5. The program makes decisions about which components are ineffective and should not continue.	1	2	3	4	5	6	7	NA

Assess: Communications

Communications: Strategic communication with stakeholders and the public about your program

	To little or no extent							To a very great extent	Not able to answer
1. The program has communication strategies to secure and maintain public support.	1	2	3	4	5	6	7	NA	
2. Program staff communicate the need for the program to the public.	1	2	3	4	5	6	7	NA	
3. The program is marketed in a way that generates interest.	1	2	3	4	5	6	7	NA	
4. The program increases community awareness of the issue.	1	2	3	4	5	6	7	NA	
5. The program demonstrates its value to the public.	1	2	3	4	5	6	7	NA	

Assess: Strategic Planning

Strategic Planning: Using processes that guide your program’s direction, goals, and strategies

	To little or no extent					To a very great extent		Not able to answer
1. The program plans for future resource needs.	1	2	3	4	5	6	7	NA
2. The program has a long-term financial plan.	1	2	3	4	5	6	7	NA
3. The program has a sustainability plan.	1	2	3	4	5	6	7	NA
4. The program’s goals are understood by all stakeholders.	1	2	3	4	5	6	7	NA
5. The program clearly outlines roles and responsibilities for all stakeholders.	1	2	3	4	5	6	7	NA

Review: Rate Your Results

		DOMAIN							
		Envirmntl. Support	Funding Stability	Partnerships	Organizational Capacity	Program Evaluation	Program Adaptation	Communications	Strategic Planning
ITEM	1.								
	2.								
	3.								
	4.								
	5.								
Domain Total:									
Average Score for Domain:									
Overall Score:									

Add up your scores in each column. Exclude 'NA'

Divide the domain total by the total number of items with a score. Exclude 'NA'

Average together all the domain scores

Action Plan



Sustainability: From Planning to Action

Environmental Support	<ul style="list-style-type: none">• Conduct stakeholder analysis to identify key stakeholders and how to engage them.• Develop talking points to gain new partnerships and/or have stakeholders take action on behalf of your program.
Funding Stability	<ul style="list-style-type: none">• Design a funding plan that allows you to adapt to changing trends.• Establish goals to diversify your portfolio and allows you to adapt to changing trends.
Partnerships	<ul style="list-style-type: none">• Create a stakeholder management plan that identifies goals for each partnership.• Identify organizations and individuals impacted by similar issues the program addresses, engage them to share how they might benefit from your work.
Organizational Capacity	<ul style="list-style-type: none">• Develop career pathways to invest in learning, growth, and advancement of staff.• Align staff to roles and responsibilities that leverage their expertise and skills to carry out essential operations of the program.

Sustainability: From Planning to Action

Program Evaluation	<ul style="list-style-type: none">• Collect and analyze data to inform decision making and advocate for resources to maintain effectiveness of your program.• Meet regularly to review evaluation data and report out to stakeholders.
Program Adaptation	<ul style="list-style-type: none">• Evaluate program results to identify needed program modifications and resources that may need to be redirected.• Collaborate with partners to prioritize program goals.
Communication	<ul style="list-style-type: none">• Develop and implement internal communication plan to promote transparency and gain buy-in from stakeholders.• Celebrate program success and share lessons learned with stakeholders.
Strategic Planning	<ul style="list-style-type: none">• Collaborate with stakeholders to design a strategic plan and build buy-in.• Use strategic plan to guide program and fiscal decisions.

Sustainability Goals in the Phase B Implementation Plan (IP) – Draft Due 9/29/23

- In addition to your required Sustainability Plan, Grantees will be asked to include sustainability goals in the Phase B IP.
- Begin by **transferring the strategies and SMART Goals** you developed for the August 21 deliverables into the template. The template is organized with separate tabs for each quarter, spanning Phase B (quarters 2-6).
- Divide larger strategy goals into smaller, achievable SMART Goals. **Each quarter should feature its own set of SMART goals pertaining to the implementation of selected strategies.** As a guideline, aiming for three (3) goals per quarter is reasonable (though not mandatory).
- Consider structuring your SMART goals as follows: **"By [date], [division name] will accomplish [quantifiable achievement], as measured by [measurement criteria], through [strategy and associated activities]."** Feel free to use an alternative format if it effectively communicates your goals.
- You can include objectives by creating a column for them in the template, although it's not obligatory; it can aid clarity.
- Begin adding Action Steps, which represent the **tasks required to fulfill your goals**. Depending on your goals, these steps may include attending meetings, participating in events, generating reports, collaborating with your GC, engaging with the project team, evaluating outcomes, and more.
- In the "Responsible" column, **clearly designate the person responsible for each action**. Please use individual names, not just titles.
- **Sustainability Planning:** While not mandatory for each SMART goal, a sustainability goal should be established to maintain your overarching strategies. Add as many sustainability goals as necessary to convey how you intend to uphold your achievements. Use your PSAT results and sustainability plan to help guide you.
- This IP is a dynamic "living document." **You'll continuously update dates and status throughout Phase B.** You'll also have the flexibility to refine goals and action steps as you hone your implementation approach. If unsure about action steps for 2024, adjustments can be made over time. While goals can be refined, ensure the strategies you've selected align with the previously approved ones and correspond to the approved budget.
- **Monthly GC Review:** During monthly GC 1:1 calls, your GC will assess your goals and request status updates. This collaboration will facilitate troubleshooting of any obstacles hindering goal attainment.

Questions?

Please enter questions in the Q&A box and/or use the hand raise function on zoom



Sustaining BHRR Strategies



Poll: How does your organization plan to spend BHRR funding?



- Outside consultant
- Software/IT
- Bonuses (e.g., sign-on, for continued service)
- Educational support (e.g., tuition reimbursement, testing or certification fees)
- Staff time (for work dedicated to grant implementation)
- In-house staff development/training (e.g., supervisory practices, cultural responsiveness)
- Other

How will you maintain these strategies after BHRR funding?

- *What is in the SOW with consultants?*
- *How do you pay for ongoing licensing fees for IT/software upgrades?*
- *What employee benefit/experience might be comparable to a bonus?*
- *What do you get for reimbursing tuition?*
- *How do you continue to pay for staff time that had been supplemented with BHRR funding?*
- *How do you maintain the KSAs developed with BHRR funded trainings?*



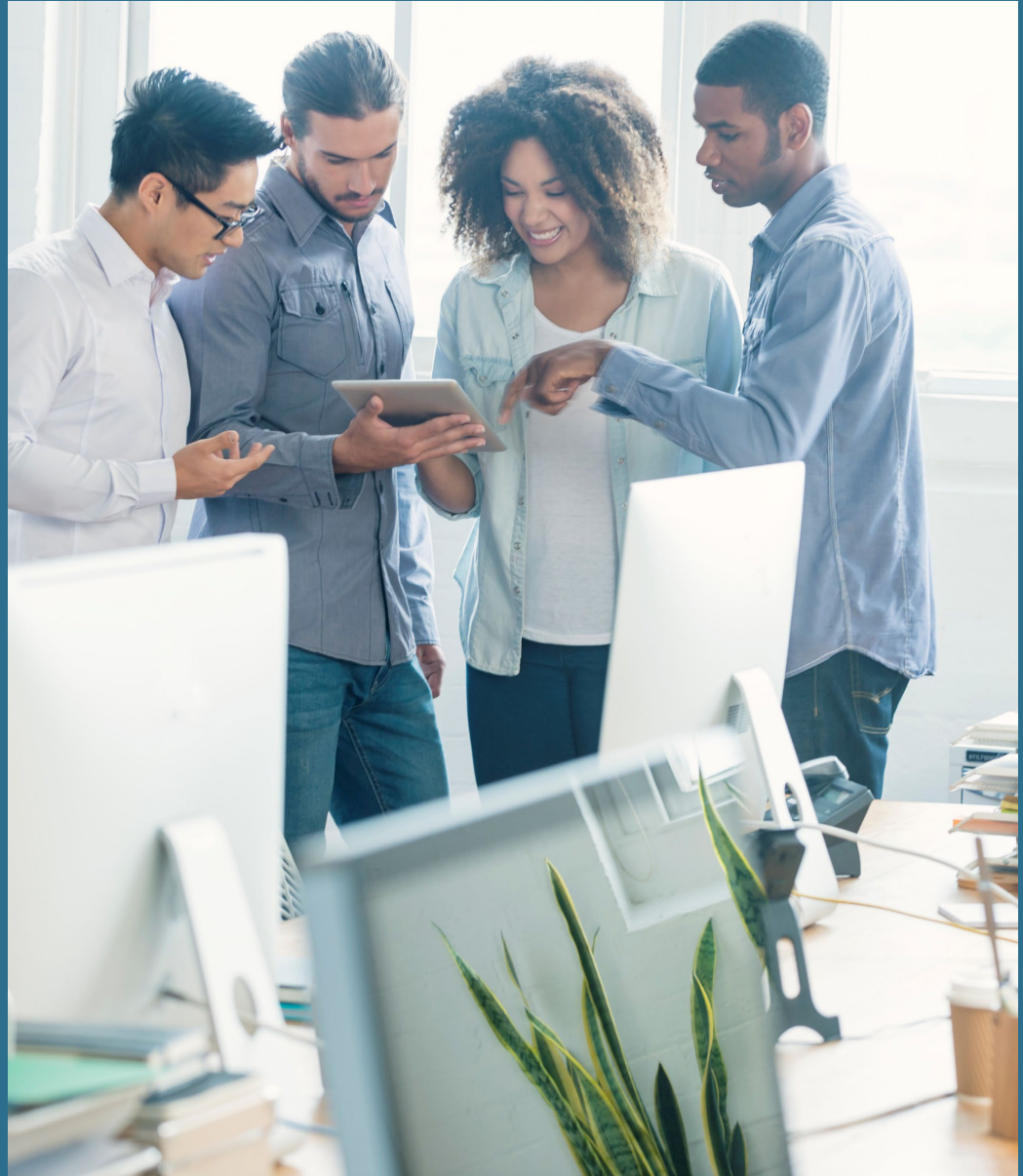
Small Group Discussion

What is one BHRR expenditure that will require sustainability planning?

Brainstorm what will go into your sustainability plan.



Debrief



Workplace Culture: The Foundation



Recruitment and Retention – Retention and Recruitment



Monetary Incentives vs Employee Experience



Compensation is a crucial factor.



Employee's experience in the organization is a crucial factor.



Monetary incentives have a short-term, positive impact.



Workplace culture has a long-term, positive impact.

The Winning Formula

Direct Compensation

Base salary/wages
Bonuses
Commission
Overtime pay
Merit increases

Indirect Compensation

- Health insurance
- Retirement plan
- Paid time off
- Flexible work arrangements
- Professional development
- Wellness program

Workplace Culture

- Engagement
- DEIJB+
- Well-being
- Job satisfaction
- Career pathways
- Recognition and appreciation

Poll: Do you have a designated person responsible for workplace culture?

Yes, there is someone in leadership accountable for this (and most staff know their name).

I think staff assume this responsibility falls to human resources.

No, there is no one accountable for this.

I don't know.



Small Group Discussion

1.

Who's got a person in place doing a good job? What does that look like?

2.

If no one's in place, what is the "wish list" for that position?

3.

What are the pieces or aspects of your culture that you would like to see addressed and improved?



Debrief: Chat Chase

We are going to ask for a response. Type your response in the chat but wait to send until prompted.

What's the one idea from this breakout session you're taking back to your organization?

Type your idea in the chat but wait to send until prompted.



Questions?

Please enter questions in the Q&A box and/or send them to

CA_BHRR@ahpnet.com

You can also contract your Grantee Coach directly.





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Thank you!

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