

PLANNING FOR SUSTAINABILITY

FRAMEWORK

A sustainability plan identifies the diverse requirements to continue key activities of the organization, project or program.

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Introduction

Manitoba Intergovernmental Affairs (IGA) has developed this framework to help funding recipients prepare a Sustainability Plan.

One of IGA's programs may have asked you to submit a sustainability plan for an activity (organization, program or project) that has received funding from us more than one time. If your intention is to continue this activity on an ongoing basis, we want to see you have a plan for keeping it going over the long term and that you have thought about how to:

- Make sure money is coming from more than one source
- Build partnerships and work together with other organizations
- Strengthen the capacity of the people in your organization

By following this framework, you will describe your current situation in the *Background* and *Current Budget* sections. You will explain your plans for sustainability through the *Strategic Goals*, *3-year Budget* and *3-year Action Plan* sections.

If you have a strategic plan or a business plan and a well thought out budget, you have already done most of the work. If not, this framework will be helpful.

Please contact your IGA project officer for additional assistance as required.

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Sustainability Plan Checklist

(use this checklist to make sure you have all the components you need to submit)

Part 1: Overview of Organization, Program or Project (p.3)

- Background of your organization, program, or project
- 3-Year and Longer Term Strategic Goals

Part 2: Current Budget (p.3)

- Expense Budget (current needs)
- Revenue Budget (current resources)

Part 3: 3-Year Budget – current, plus 2 years (p.4)

- 3-Year Expense Budget (future needs)
- 3-Year Revenue Budget (future resources)

Part 4: Action Plan (p.5)

- 3-Year Action Plan

Supplemental information to attach:

- Financial statements or actual budgets from the last 2 years
- Community plans, business plans or strategic plans (if they are relevant)
- Signed cover letter indicating the board's endorsement of the Sustainability Plan

Required Components

Part 1: Overview of Organization, Program or Project

Background

Depending on the activity being funded by IGA, describe your organization, program or project, including:

- Vision and Mission
- History
- Structure
- Need/ problem/opportunity being addressed
- Target group(s)
- Activities
- Key people
- Partnerships
- Location and contact information

(Refer to Appendix A: Sample Overview Questions, p.2)

3-Year Strategic Goals

List the goals you will be working towards over the next three years and, for each one, indicate the year you expect to start working towards it. Also, include any longer term goals you are working towards.

(Refer to Tools and Examples - Appendix A: 3-Year Strategic Goals, p.5 and Appendix B: Ways to Create Sustainability, p.12)

Part 2: Current Budget

Expense Budget (current needs)

Include a current expense budget:

- List your budget expenses for this year. Include any items you use but do not pay for such as, a location or a vehicle. Attach an 'in-kind' cost to these items.
- Make sure you have separated out the core expenses from the program or project expenses. (Refer to Appendix D: Glossary of Framework Terms, for definitions)
- Explain how you calculated each item. If you cannot fit the calculations into your table or list, add a note at the bottom.

(Refer to Tools & Examples - Appendix A: Sample Budget and Questions, p.6)

Revenue Budget (current resources)

Include a current revenue budget.

- List any income for this year. Include funding from all sources, in-kind resources, donations, and earned income. Identify if items are in-kind.
- Revenue (or resources) should equal expenses (or needs).

(Refer to Tools & Examples - Appendix A: Sample Budget and Questions, p.6)

Part 3: 3-Year Budget

Include a 3-year budget, in which revenue (or resources) equal the expenses (or needs).

3-Year Expense Budget (future needs)

Use the current expense budget and the strategic goals as a basis for preparing the 3-year expense budget.

This budget will show which items need more resources in the next few years and which items you expect will need less. Add any new expense items that you will need in order to keep things going or to increase your work in key areas.

(Refer to Appendix A: Sample 3-Year Budget and Questions, p.8)

3-Year Revenue Budget (future resources)

Use the following information to make decisions for the 3-year revenue budget:

- financial statements or actual budgets for the last 2 years
- your current budget, and
- your 5-year strategic goals

If you want to explore more ways to make your organization, program or project more sustainable, refer to Appendix B: Ways to create sustainability and Appendix C: List of useful websites.

(Refer to Tools & Examples: Appendix A: Sample 3-Year Budget, p.8)

Part 4: Action Plan

Include a 3-year action plan.

3-Year Action Plan

Using the 3-year budget and strategic goals as a guide, provide a list or table of specific actions the organization will do over the next 3 years to achieve the 3-year budget and the associated strategic goals.

Plan in detail:

- What action needs to take place to achieve your sustainability goal?
- Who will be in charge of each action?
- What roles do staff and partners have in each action?
- What specific steps need to happen?
- How much time each step and action will take?

(Refer to Tools & Examples - Appendix A: Sample action plan, pp.9-11)

In the action plan, include a system to track and evaluate your progress. Consider these questions:

- Who needs to make decisions about the action plan?
- How are they going to know what is happening with the overall plan?
- How are you going to make sure the people identified in the action plan know what they are supposed to do?
- How often are you going to review and make changes to the action plan?
- Who are you going to report these changes to?
- How will you get them the information?

Once you have completed the action plan, review it with the people in your organization who will be making decisions about the sustainability plan.

Check that each action and step in the action plan passes the “SMART” test:

- Specific and Simple
- Measurable
- Achievable
- Realistic and
- Time Sensitive

Ensure steps in the action plan are timed to fit the resource needs in the 3-year budget.

As a last step, go back to the Sustainability Plan Checklist on page 2 and make sure you have all the required components.