WEBINAR VIDEO TRANSCRIPT

Sustainability Webinar Part 2: Five Steps to Assess the Environment

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SALINA TEWOLDE: Good afternoon, everyone. My name is Salina Tewolde and I'd like to welcome you to the Path to Program Sustainability Webinar Series-- Five Steps to Asses the Environment. This TA call is brought to you by the Office of Adolescent Health. I would now like to introduce to you today the first presenter, Sharon Vardatira. Sharon Vardatira is the director of nonprofit funding and fiscal solution at the University of Massachusetts, Donahue Institute. Sharon, the floor is yours.

SHARON VARDATIRA: Thanks. So just a quick little bit about the Danahue Institute, where I work. It's the public service arm of the UMass president's office, where, think of us as a mid-sized consulting firm, functioning in many ways independent from the university. So we're not like an academic thing.

And I work with nonprofit funding and fiscal solutions. We serve nonprofits of all sizes, and we also have the national nonprofit sustainability center. Some of you may remember us from our work as OAH's provider of community, mobilization, and sustainability capacity-building assistance to OAH teen pregnancy prevention grantees in FY 2017. That was always a big mouthful for me.

Anyway, I have been working with nonprofits for over 30 years now. I've been a program director, fund development director, executive director, and then for years I ran my own management consulting firm for non-profits with a really intensive focus on fund development, and that was before I came here. And it was in that capacity that I first started doing internal assessments with organizations. These were really just readiness assessments at first. Are you ready to seek a big government grant, or are you ready to run a major donor program. Do you have the elements in place that you need to do those things. Those internal assessments were designed to help organizations think about whether they were ready to take on that particular task.

Over the years, however, my assessment work expanded to include community assessment and, eventually, the entire, what we're calling, environmental assessment here. So I've done everything from guided board to consider whether they have capacity to do a special event to helping a Head Start program do a regional assessment of migrant and seasonal workers, the whole thing. Those kinds of assessments, everything in between.

And I'll tell you one thing has become totally clear. No one has ever gotten to the end of an assessment process and said, oh, yeah. We knew that. Totally expected that. The information has always been everything from informative and significant to earthshaking, which has always been interesting when it's the latter. When you start asking questions, you're almost certainly going to learn things you didn't know and which you need to know to be as effective as possible. And that matters very much when it comes to sustainability, as we will be talking about through the course of this webinar.

A little disclaimer, this is the second in the series of four webinars in on our sustainability webinar series. As I'm sure you're all aware by now, the OAH framework for achieving sustainability outlines eight factors. You see them in interesting order there on the right. These factors are intrinsic to effective sustainability planning and sustaining programs. So not just the planning of it, but the doing of it. As you can see, each of the webinars looks in-depth at some of these factors.

Today, for example, we'll be honing in on a factor 2, assess the environment, and factor 4, remain flexible and evolve. Not surprisingly, some factors repeat in different webinars. You'll see that "remain flexible and evolve" is kind of core to many aspects of sustainability. And just a quick refresher on the eight factors here, basically, these are characteristics identified by OAT and true in the world that are considered critical to achieving sustainability. In OAH's vision here, which is the little tree on the right, the factories for program sustainability come together in this sort of tree-like structure. You'll notice that assessing the environment is part of the trunk of the tree along with engaging and developing leaders.

And I kind of think that makes sense because, really, you can't get to the leaves unless you go through the trunk. So without doing the assessing the environment, everything kind of withers and dies on the trees. I'm not sure that's how OAH first conceptualized it, but that's kind of how I see it. Everything you do should be influenced by what you learn in the environmental assessment. And that way, you can't get to program sustainability without it.

In today's webinar, I'm going to be defining what an environmental assessment is, and the two major components of an environmental assessment, or the part A and part B, namely the internal capacity assessment and the community level assessment. Then, we'll dig a little deeper into how to structure each component, what questions are typically the focus of the internal and the community level assessment. How to collect information and how to manage, synthesize, and analyze that data or information. We'll look at some real world examples of environmental assessments and how, in each case, the assessment drove actual adaptations and decisions that each organization made around sustainability. And, finally, I'll review how you go about sharing your findings. Because once you do the assessment, you've got some information to tell, some stories to tell.

What is an environmental assessment? You're familiar, I'm sure, with part A there, the internal capacity assessment. This has been a fixture of the OH sustainability planning process for a number of years now, and it makes sense. If your infrastructure isn't strong, your program structure, personnel staffing and so on, then you're going to fail to thrive. I thought I might use an analogy that you could probably all relate to here.

So let's imagine for a moment that your OAH program is a teenager. If you want to know whether that teenager is going to thrive over the years, develop in strong ways, much like you might want to have your program thrive, and grow, and sustain, it's certainly helpful to understand what's happening immediately around that young person.

What's their home life like? Does she have food and safe shelter? Does she have internal capacity-- resilience, if you will? That's comparable to looking inside a program, the internal capacity assessment. We learn how resilience a program is, whether the infrastructure is in place to support the program's growth. Are the policies, procedures, and staff in place to make it successful? So that's the internal capacity assessment.

But as in the case with the teenager, internal resilience, and food, and clothing and so forth isn't the only thing that's impacting her life. If you really want to know about that teenager's world, know what's going on around her, you have to look outside her home. What's happening in her community? Is it youth friendly? Do other youth in the community face particular obstacles? Does she face particular obstacles or threats? Does it make a difference if she's growing up in inner city LA, or in a border town in Texas, or in rural Maine?

If the community around her supports sexual health education or whether the community is divided on the issue or completely opposed? Of course it matters. We can understand a lot about a young person by just looking at their home, and whether their family is strong, and whether they have books to read and healthy food to eat, but I think we'd all agree that what is happening in the wider community around that person is hugely influential.

If we really want to develop programs that support teenagers, youth in the program, or do anything else, we have to understand the environment around them. So likewise, if we want to build strong sustainable programs or, even more importantly, sustained positive outcomes, we can't really do a good job of it if we don't understand what's happening in the community around those programs. So all this to say, an environmental assessment is a two-prong process. On the one hand, it's an internal capacity assessment. In particular, that leans heavily on what your internal stakeholders, staff, board, program participants, partners, understand about your program or organization. Community-level assessment is looking at the world around you, especially those features, opportunities, threats and so on that are likely to affect your program.

So a truly meaningful assessment doesn't just look at internal capacity, but also looks at what's taking place externally that might impact the program. We're going to be doing a poll here. So the poll, the question is, "To what extent has your program or organization conducted an environmental assessment?"

First answer, we've never conducted a formal environmental assessment. Second, we did something like this in the past, but not recently. Third, we conducted an environmental assessment as part of our sustainability planning process. And fourth, it's a regular part of our ongoing planning cycle. So make your choices, and then we will see where everyone one lands here.

I should also say that lots of people do this in different ways. So what one organization might think is an environmental assessment might look really different to another, but they're both doing an environmental assessment. Now, I see the response. Oh, that's great, actually. People are kind of a little bit all over the map. Most people, we did something like this in the past but not recently. And we have some experts in the room, about 25% of you do it all the time. So good for you, and glad you're here. We can compare and contrast when we get to the question-and-answer part.

Before we dive into looking in detail at what constitutes a strong and comprehensive assessment, I just want to be clear. Like I just said, the different programs may take on different parts of an assessment, depending on the resources they have available and what they're seeking to learn.

I've worked with organizations where their entire assessment process takes place in a day, with people internal to their organization asking questions about both sides of the A and B parts of this, as well as organizations that have done, like, 5,000-person community survey, and looked at external stakeholders, and called funders, and sometimes you'll get really good quality doing both of those sorts of things. I think you get some interesting things, certainly if you reach out further, and see more people and talk to more people. But they can be very valuable ways of doing it both ways. So I want to say that you don't have to do everything that we're going to talk about here in order to do an environmental assessment.

This is the typical focus of the internal capacity assessment. And these four categories are actually the categories that the OAH assessment tool. So OAH has a self-assessment tool. And these are the focus categories of that tool. There are lots of different tools out there to do an internal capacity assessment, and some of them look at these categories.

Most of them look at some iteration of these categories, but some of them will look very deeply at, say, fund development or communications tools or things like that. So these are just to have an understanding of what some of that focus is, give you a sense of the different ways in which one can approach capacity assessment internally.

This is the key stakeholders and data collection methods that you would be going to, as you're conducting an internal assessment. So this list of key stakeholders that you see here, again, can be very different, depending on the program. This is a list of typical stakeholders that you might survey, or interview, or invite into focus groups, or comment on the program, or program functioning in some way. They might talk about the profile in the community, your reputation, how you connect with youth or families. There's so many questions that you could delve into.

But you need to be strategic about who to pull. You might want information, but you also don't want to invite competitors or entities that might not be true advocates of your program into the process, and there are people out there who may not have anything really valuable to say. They don't really know you very well. So you want to be strategic about who you go to here.

In the same way, it can be-- I wanted to give an example of an organization that I work with. It's a really great organization. Real name here, cancer connection. And they're beloved in the community. Everyone thinks they're amazing. They do incredible fundraising, and they decided to do an internal assessment.

And one of the people they went to was someone who's fairly a high profile decision-maker in the community, but also knows of them, and they work with a lot. And they thought, this person will have really great things to say about us, let's go to this person.

But she may also have some critical things to say. So when we reached out to her and, actually, I did the interview as a third-party external person, she had some very specific things to say about their organizational management, if you will. She was not delighted that the board was a lot of caregivers and not people who were really sound in terms of fiscal knowledge. And she indicated that she would give a lot of money and donations if she thought there was someone on the board or people on the board who were in a position to really know how to manage that money.

That's a really interesting and invaluable piece of information to have, especially for an organization who pretty much always hears, you're wonderful; you can't do anything better. So that turns out to be a real game-changer in some ways. You also want to tap external stakeholders who may have a different perspective. So you don't want someone who's just going to sort of be the party line. You want someone who might have something different, who looks at you from a different perspective. You'll be asking-- and this is the confusing part. You sometimes go to external stakeholders when doing the internal assessment, and you go to external stakeholders when doing the external or community assessment, but you're asking them different questions in each of those situations.

For the internal assessment, you're going to be asking them to reflect on how the organization functions, its management, it's position in the community, and relative to competitors. In the community-level assessment, they will be providing input about external factors likely to be impacting the organization. So, for instance, in that example I just gave, she was asked to comment on the organizational functioning as part of the internal assessment.

But had we been doing a community assessment with her, we might have asked that very same person whether she thinks there's is a sub-population in the community that does not know about cancer connection or what is changing in cancer treatment that might impact the work of cancer connection in three to five years. Those are all important things to do. And the data collection methods, these are just some of the very core ways that people collect data in the internal assessment. Sometimes it's just a board sitting down and doing a self-assessment tool, like the OAH1. You might survey people or staff within your organization. You might have the individual interviews like I just talked about or conduct focus groups with particular stakeholders, say, participants or something like that.

These are some of the topics and questions that you might be examining as part of the internal assessment. And so to get a little more granular about exactly what you might be asking, we have some actual questions at the bottom there. And the first set of points that you see are from OAH's internal self-assessment tool. And it's just a few questions from a much longer tool.

Basically, in that situation, you're ranking your program or organization against these criteria. There are a variety of tools available for self-assessment, and I actually developed one that I do in about half an hour with a board. It's got like 50 questions in it. I think of it as the Cosmo quiz of self-assessment. But we've validated and studied it over the years, and it actually gets really good results for a group-- like a management group self-assessing. It kind of reveals some of the weaknesses and real strengths of the organization.

So you can do something that's very specific and short like that. And you can do something, which is a multi-day process. So the second set of questions at the bottom here that you see is from also a much larger question set. And these are the kinds of internal assessment questions that you might want to ask external stakeholders. Again, just to reiterate that point, you can go to external stakeholders, both for part 1 and part 2. These are questions about the organization that you're looking at for part 1.

We're moving now to part two, the community level assessment. You remember the focus areas for the part A, the internal assessment. Community-level assessment, as you can see, explores factors that have the potential to impact the organization at some point now or in the near future. And you can see how all of these could have a huge impact on an organization. The economic environment, anyone who lived through 2008, knows that suddenly there were people who had no money to pay for things. So services could not be done in the same way or your clients might leave, things like that. So it also affects philanthropy and where money's going.

Even the interplay of economic environment and weather stuff can just shift philanthropy in a really huge way. If you imagine a huge hurricane coming, suddenly philanthropy is looking at doing some basic need emergency response, then money is suddenly going there, where it might have been going to sort of more regular ongoing programming. So demographic and social environment, this is huge for organizations. And organizations just go along thinking that their population is basically the same. But if you're, say, serving a youth population and there's an influx of individuals or sub-populations that are not primary English-speaking populations, you have to think about how you're going to reach out, and what you're going to do, and how you connect with people who may be from different cultural backgrounds.

Those things are hugely influential. Political and legal environment, I do not need to tell this group that what happens politically, what happens in terms of priorities, funding priorities and things like that, can, again, have huge consequences for you. And in terms of media and technology, that, again, is around how you communicate, how you disseminate information, how you put yourself out in the world. All of these things are hugely important. So if you're just looking at your internal stuff-- you can have all the capacity in the world, but if you don't understand what's happening here, you could be in some trouble down the line.

In the same way I did this on the internal side, now we're looking at information and data sources and gathering methods for the community-level assessment. And these are just some of the more common sources that can help describe what is happening in each of the focus areas. And I should say that can look really overwhelming. Because, like, oh my god. There's so many sources. How are we going to go to them all? You don't go to them all. You strategically pick a few, usually, and sometimes they're very available in the community to you.

But I always suggest to people that you gather the information that's most easily available, like census data or your own client data, to make sure that you can focus more of your time on the time-intensive data collection methods, which are often those things like focus groups or surveys, that kind of thing. And often organizations I work with do not do all of these things. I think there's a rare organization that does. But they might decide, we're going to do a survey, and we're going to do a focus group with a particular sub-population. So those are just some of the ways to approach this.

Here are some questions that you might see on a community-level assessment. And each program obviously needs to come up with questions that address their particular community and target population. If you are looking at youth specifically, you might ask a whole other set of questions here, like how are the ways in which youth are communicating with each other and that they might communicate with us? How are those ways changing?

How do youth prefer to learn or engage in our program? What policies are evolving at school or at the local level that are likely to impact how young people learn about, say, birth control? How has the young parent population changed in recent years? How will it be likely to change in the next three to five years and so on.

And you can see, once you start down this path, the questions really keep coming. And I'll go back to how to formulate that as we go through the steps of the process. Speaking of steps, these are the five basic steps to conducting an environmental assessment.

And there are some things that are important here. It's important, I think, to-- you'll do better if you adopt a team approach when completing these five steps. You want to involve multiple individuals with various perspectives, and you also want to ensure that team members have adequate time to collect their data, put together tools, really figure this out. Ideally, your team will use the information you gained through this assessment process. Not ideally, this is really the purpose of it, to take steps to enhance your organizational capacity, ensure high-quality programs and program sustainability.

We're gonna take a closer look at each of these steps. And as we go through, bear in mind, again, that programs very rarely design their process exactly like the one I'm about to lay out. The point is to design an environmental assessment that works for you and focus in on the information that you really are interested in learning.

This is all about the process of developing the plan for conducting your environmental assessment. It's kind of critical to start with a good planning and organizing session, if you will. Not only does your plan have to have a solid foundation for involving your key stakeholders from the start, but it's also going to be your roadmap for the whole process.

And it's going to ensure that what you do is thorough, and accurate, and efficient, and works for you. Although it requires an investment of time at the beginning, the assessment plan will save you time and effort over the long run. So you don't want to just, let's do this. Here's a tool, blah, blah, blah. You really want to think this through.

So your first task, one of your most important tasks will be to identify your planning team. And preferably that planning team includes a mix of staff, program participants, maybe or community advisory group or youth leadership council, members from those, and community partners, but you also don't want to have it be so large that it's unwieldy. Your key stakeholders and the broader community are definitely more likely to trust a process and support the results when the plan behind it is driven by a representative planning team. And you can probably, in your own mind, imagine that if the planning team is a certain group of people and it's not representative of your community, people are going to be like, what do they know?

This group determines what information they want to collect. They establish a timeline and assign responsibilities, and they basically prepare for the whole process and inform people about what's happening. Once you have established your planning team, and the timeline, and the main tasks, it's time for step 2. And that's where you really want to dig in and clarify what you want to learn, specifically what questions you want answered, how best to gather accurate data that will inform those answers-- and probably the questions, too.

Begin step 2 by identifying the core areas of internal and external that you're going to be exploring. And within these categories you're going to develop your primary questions through your environmental assessment, including questions that explore issues that are unique to your target population and region. And by primary questions, I don't mean the questions that you're going to go out and ask people.

You might ask someone something about what's happening in their school, or what their friends are saying, or something like that, but the primary questions are the things that you're trying to figure out. So a primary question might be, how are community demographics changing? The specific survey or interview questions that are used to inform get answers to that question in different ways.

Step 3, now you've done all that. You're ready to gather your data. And this, of course, is going to have a big impact on the quality of your environmental assessment. So in this step, you design your data collection plan, but you actually go out. So by the data collection plan in this, I mean, I like where you're going to go? We're going to set up the focus groups here. We're going to hold them, make sure all those things are set.

And this includes contacting the data sources you've identified and asking them questions to obtain the information that you need for your environmental assessment. And you have to be aware of-- when you do this, you're not going to approach everyone the same way. Different people, different cultures, different backgrounds have different expectations about how you do this.

I remember talking to someone once in a program who was working with-- and I wanted to say it, but there was a influx of immigrants from another country, where they were really uncomfortable with people knocking on the door, come to a focus group. But if you went in, you had a cup of tea, you sat, you hung out with them, you could get answers to those questions. This was a Head Start program I was talking about. And Head Start does a very detailed comprehensive assessment. It's part of their federal requirements. They think a lot about cultural considerations and also having a trauma-informed approach, being inclusive, all those kinds of things.

Now we have all this data. We have gobs and gobs of data, and what do we do with it? I have had organizations come to me and say, we have lots and lots of data. Can you help us do something with it? But this is the payoff of the environmental assessment, the reason you've been doing this work all along. And something to keep in mind is, even before you have collected all your data, you can begin interpreting the emerging results. And this will enable you to make adjustments in your data collection tools or approaches as you need to to improve the quality of the responses you're getting or to fill information gaps.

For example, if survey respondents are frequently skipping a particular question, you should consider whether rewording the question will result in more responses. So in analyzing data, ask your team to look deeper than simply tabulating the results.

What are the findings mean about the trends and changes in your community? What patterns are you seeing? What possible actions should be taken by your program based on what you've learned, which, of course, is where this is all going.

Final step-- communicating and incorporating your decisions and your findings into your sustainability plan. So you've analyzed the data. You've drawn meaning from the results-- see how easy this was? And establish priorities and recommendations based on your findings.

At that point, you need to report on what you've learned and embed those assessment findings into your sustainability plan and, frankly, any other planning process. This will look really familiar if you've done strategic planning, or fund development planning, or any kind of planning. Really doing some kind of assessment is a really important aspect of doing that to really inform the decision making that you do.

As you turn towards preparing the report, consider how you'd like to present the information internally to your community and to individuals who participated in your data collection activities. You may want to go and broadcast this to the whole community, or you may just want to limit the results to your agency, and hopefully OAH.

Depending on your audience, you might decide to hold a meeting to discuss the results. And you might do a written report with a PowerPoint, and a short video recap, or a community fact sheet. Be sure to use accessible, clear language when you do this. And accompanied by easy to interpret charts, and tables, and graphs, and photographs. And I've had organizations actually do this. They'll decide to disseminate maybe a piece of what they've discovered and decided to the community, as part of a rollout of a new strategy. Here's where we're going. Here's why we are doing this.

This is the first of three real-world case studies I'm going to give you. I've changed the agency aims to protect the innocent here. I just joke, but I haven't got permission from them to share their weaknesses. So I thought, let me give them a pseudonym. Each of these is presented to sort of demonstrate how assessment findings and form decisions that were subsequently made related to sustainability plan and strategies, as well as decisions about the program going forward.

So this first case study involves a program that had, for lack of a better term, drifted away from its root focus. It was kind of losing its identity and its community presence. This is an organization I've been around 20 years in the community. It's "All Our Families." That's what we call it. Serves a primarily inner city and targeted to Puerto Rican families in the inner city, and they started out as sort of a family mobilization advocacy. We're going to make change, where change is needed kind of group.

And, along the way, they established a child care and, over the years, they became known as a child care agency. And so even though they were doing these other programs, at some point when their child care went away, they discovered, in doing the assessment, that people still thought of them as a child care program, only, oh, they don't do it anymore. They don't exist anymore. So there was some in the community that were aware of them. But they certainly weren't aware of the breadth of their services. They also had a very passionate and committed board, but they were kind of weak on the infrastructure, in part because their funding had been very up and down, and they had kept changing their focus, but they did still have this strong history of engagement with the disadvantaged Puerto Rican community.

As a result of their internal assessment, which came back to their-- they were surprised at how many people did not really know what they did in any meaningful way. They decided, you know what we really care about, we really do is, the advocacy work and the community mobilization work. And this was right after the hurricane hit Puerto Rico. And they became aware also-- and this is where that external assessment is important-- that people were going to be coming to the community to join their families there, leaving the island and coming to the mainland.

This was an opportunity to reboot, to put their message out in a big way, they repainted their front door area. They started talking to people, and they really went back to their roots, and they also, in terms of the sustainability piece of this, realized that the sustainable thing to do was to stick with what they did well and what they wanted to continue to do.

And so they were able to get funders on board for that instead of chasing all these myriad different funding things, we can do this. We can do that. Suddenly, DCF wants this. They really hunker down, if you will, and got back to their core. And they also got fiscal management and consultation because they realized, this is like a real gap that we have as they were doing the internal assessment.

This organization, we will call community youth matter was an organization that did an assessment and found a couple of things were happening. One is that they were having real challenges around their staffing, their structure, they had a lot of turnover. And that was an ongoing source of friction in the organization.

However, that was all internal. Externally, they were seen as gold standard organization. They had really strong community partnerships. They were out there doing incredible outreach advocacy work and education, a lot of education around youth issues and youth health issues.

The other thing that they realized as part of this assessment, this was a realization that occurred, actually drove the assessment. Changes and legislative priorities had meant a change in their funding in a really significant way. So they were losing major funding. And that was like a, oh my gosh. How are we going to go forward? So they had this great reputation externally. Their infrastructure was OK. They had weak staffing and staff working together.

And they also-- this is the other interesting thing is that they are a holder of significant resources. They had lots of training materials, skilled people, good curricula. They made a decision, and the first decision they made was to dissolve, at which point you might say to me, well, how the heck is that sustainability. The thing that makes this a great sustainable story is because what became important then was how to make sure that a positive youth outcomes that they had been driving continued.

So even if they were going to dissolve, how would that other stuff continue? How would they sustain that important outcomes piece of it? They first did some through-- it didn't happen quickly, but they did identify an outside organization to entirely take on the program, the youth health program that they were most known for and that they would be giving up. And then they took some very thoughtful concrete steps to dissolve the organization.

A big part of that was how to talk to the community about this. They wanted to make sure first that they'd transferred the knowledge and skill, that they'd set up the new organization in a great way. And they didn't want the community to come away going, oh, my gosh. All is lost. This organization closed. What will happen? This is terrible. They wanted to be able to announce it and say, here's who's taking over. Here's what's going to happen that's good. And then they did real work around transferring that knowledge to the new organization.

So that became two webinars that can be recorded so that people can hear what the content knowledge was that we had around this issue. Make sure that they have the files and the curriculum. Make sure the training transfers. And make sure some of our staff get over there, too, which is one of the other things. That's case number two. And we can go to case number three. This organization, we're calling Youth Health Connect. This is a very established program within a hospital setting. This is like an organization on its own, but it was parented by a hospital.

And one of the things that happened when we sat down to do assessment and one of the things that drove it was this understanding that the landscape around health insurance was changing. So this was pre-ACA. And their whole focus had been up until that point, I should say this first, linking youth to health insurance.

So they did a lot of work around making sure that young people, and young adults, and children-- and everyone had health insurance. So as the ACA came out, as children's insurance actually became more covered, the work that they had been doing around that sort of became a little obsolete. Or they saw that it would be becoming obsolete.

But this was an organization that had a real deep commitment to ensuring that youth had access to health care. They had incredible leadership. They had strong skills, good infrastructure, but it was like their whole reason to be had gone away or was soon going to be going away. And, oh, there was also these major demographic changes coming, where non-English speaking population and immigrant influx from war zones was a reality. So how do you deal with all this?

First, they said, well, we've got to start looking at how else we can advance health for youth than just merely connecting them to health insurance. So that became a reboot of their focus, but it was also core to their focus. It wasn't like a change in their mission. It was just a different way to go about doing their mission.

They realized that this new influx of subpopulation, if you will, within the community didn't have access to actually insurance or anything else necessarily, needed a lot of support. So they incorporated programming around that. They approached new funders with an interest in this expanded focus and target population to great effect because there are definitely folks in the local community who want philanthropy in the local community and donors who wanted to serve that population.

They also, because they had these leaders within the hospital and within their organization, they were able to tap those people to really help build a major donor program around this, which they had not had. And then one of the things which I felt was really cool in doing this assessment process is we were aware that there was a presidential campaign coming our way.

And I think it was about 16 months, and they thought, why don't we do an event which we can tie to the presidential campaign and make sure that people coming through come our way to speak at this event. So they planned that about a year and a half ahead of time to do this major rally. Actually, I think it was a statewide election. It was the big election, but it was the statewide candidates for senate and things like that they were trying to get in.

That was one way that they did it. And all of these three examples are really good examples of how sustainability planning ties to the environmental assessment. I wanted to come back to presenting the recommendations piece of this, just to say, how did these three very different organizations present their decisions and their recommendations for moving forward in the communities?

I would say really thoughtfully, there are many ways to present recommendations that come out of your assessment, but there are two things. You want to make sure that they flow from the logic of the assessments. So we made this decision because this is what we learned. And when you're communicating that to your internal stakeholders or to the public, they're going to want to understand what drove that decision. And so you need to be able to make that case.

And it's helpful to frame each recommendation in a manner that establishes the relationship between the data and the recommendation. Our environmental assessment has revealed that, and therefore our program will, that kind of thing. I feel like this should be obvious, but you're going to be not surprised to learn that just as sustainability planning is an active, and dynamic, and ongoing process, the environmental assessment is also an aspect of sustainability planning that is ongoing.

So it's your data source driving the planning process, if you want. You need to reassess your environment on a regular basis in order to ensure that your data is correct. Whatever components of the planning process you decide to focus in on, it will always be true that effective programs engage in a process that is cyclical.

And some final thoughts. I thought would be important to do making it manageable slide because I know that's a lot to contemplate, doing a large assessment like that. Making it manageable is important and really key. You want to embrace a team approach. You want to have a point person so you have some someone who's sort of driving the process and will be the "buck stops here person."

You want to make sure you orient members to your process, and don't bite off more than you can chew. It's OK if you only do a couple of elements of these or even one element of these to get started. And it's also, I think this is important to think of what is out there as you're doing your assessment. Head Start does these regularly. Community health assessments are done.

HUD does them. So don't feel a need to redo anything that one of these other entities might do. Grab it, incorporate it into your own assessment. That's the way to go.

And you can report it as far or as wide as you want to. Oh, I should say, I think I've alluded to this through this whole thing. You can also hire a consultant, who can do any of these things--oversee the process to write your final report. So those are just some final thoughts on that. And then I wanted to open this up for questions. Any questions out there? I'd love to hear your thoughts, what your experience has been with assessment.

SALINA TEWOLDE: Thank you so much, Sharon. As a reminder, if you would like to submit a question, please type your question into the chatterbox. Your lines will also be unmuted if you want to submit something verbally.

SHARON VARDATIRA: As people are typing, I'd be interested to know if any of you have done this, and I know about a quarter of you do this regularly. How does this align with what you have done and what were some of your takeaways from your assessment? And what did you learn in the process? Like, what was informative for you?

SALINA TEWOLDE: I had a question, Sharon. Can tell us more about how to assemble an effective environmental assessment team?

SHARON VARDATIRA: Yeah, I think what you want to do is look around your organization and think about how you will get the best people into the room. Like, who's, first of all, interested in doing it, but you also want that sort of different-- you want some staff. You want volunteers. You want participants. Obviously, this will differ depending on what kind of an organization you run and what you do. You might want to bring some key stakeholders in.

But you also-- when I say key stakeholders, external key stakeholders, but you want to be careful about that. So if you imagine for a moment, we have a funder who's really into our organization. You may not want to invite that person to be part of your assessment team unless they're really in the trenches with you doing the work with you. Then, you might really want to do that. But this is also, you're going to be looking hard at your organization, your weaknesses, your strengths. So the people who are at the table have to be people who are heavily invested in your organization. And you don't necessarily want people at the table who you maybe want to always have your best face forward to. So that's something to think about.

SALINA TEWOLDE: Perfect. Thank you. Do we have any questions over the phone?

SHARON VARDATIRA: Or comments over the phone? I'm open to that, too.

SALINA TEWOLDE: I had another question. Under your "Analyze Data, Make Decisions" slide, you stated that you needed to establish a strength-based sustainability strategy to be used immediately and in the future. Could you give us an example of these types of strategies?

SHARON VARDATIRA: Yeah, so I think a strength-based strategy-- like, when I was talking about that first, the first-case study-- and, actually, all three of them were strength-based if you think about it. The first case study, one of the things they went to and one of the questions that I typically do when I'm working with an internal assessment piece of this is, what is it that you do really well? Like, look at that. What is that you do well?

A lot of people come to assessment in terms of, where have we been failing? Where are our weaknesses? So when I was working with that organization and I said, what do you do well? When do you get excited? What kind of work jazzes you up? That was what I heard things like, when we're working in the community, when we're going door to door, when we have families coming in and talking about, they need transportation and we figure out how to get transportation to schools better than it is now, that's when everyone had an aha moment, which was, wow, we're doing all kinds of other things other than the things that we do really well.

The things we do really well we still do, but we don't really focus on that. So when they came to deciding how to move forward and what was important to sustain, they realized that that work was the most important work they did and, frankly, the stuff that they did better. Someone else could do child care. Someone else could maybe run the Nurturing Fathers program. But maybe what they do best is sitting down with families, having families come in, figuring out how to solve problems for families.

So that's what it means by strength-based. And it's really important. I'm glad you asked that question, because it's such an important part of the assessment process, is figuring out where you want to be and what to keep going that builds on where you are doing well and what you do well. So even the organization that closed, what they kept doing was what the piece that they transferred-- the curriculum, the knowledge, the content, that was what they did well. They didn't keep going with the bad staffing plan, where the staff were disgruntled, but they said, how can we keep what we do well going into the future? And so that was, again, strength-based.

SALINA TEWOLDE: Thank you so much. That's really helpful. OK, I'm not seeing any questions.

SHARON VARDATIRA: Well, thank you all for coming. It was great being able to present. I wish that we were all in a room together because I'm sure we could pull out some more dialogue from the group.

SALINA TEWOLDE: Yes, I agree. Thank you so much, Sharon, for your in-depth presentation. Before you guys leave, we would like your feedback on today's call. You can access a link to the feedback survey in the chat box. You will also receive a follow-up email with the survey link and links to TA resources from today's call. Here are some more ways to connect with us-- through our website, Twitter, and our periodic newsletters. Also, please look at our YouTube channel. Thank you for your time. Thanks, everyone. Thank you, Sharon. Thank you. Have a good day all.