

# GUIDELINE FOR SUSTAINABILITY ASSESSMENT AND PLANNING WORKSHEETS

The assessment and planning worksheets provide a framework within which to plan activities that have the potential to increase the long-term sustainability of new ways of working and improved outcomes.

## **ASSESSMENT WORKSHEET OBJECTIVE:**

To determine which factors are not currently supporting the sustainability of your improved outcomes, yet are important to sustainability and have the possibility of being strengthened.

## **PLANNING WORKSHEET OBJECTIVE:**

To determine what sustainability activities (including addressing possible challenges) need to be conducted in order to increase the positive impact of factors important to the sustainability of your improved outcomes.

## **DIRECTIONS:**

1. Refer to the sheet *Sustainability Factors – Operational Definitions* when completing the worksheets for descriptions of the sustainability factors.
2. Starting with the *Assessment of Sustainability Factors*, place a checkmark in one of the first four columns for each of the factors.
  - The first column (–) indicates a factor that is currently considered weak in regards to its impact on sustainability.
  - The second column (0) indicates a factor that is currently considered neutral in regards to its impact on sustainability.
  - The third column (+) indicates a factor that is currently considered strong in regards to its impact on sustainability.
  - The fourth column (N/A) indicates a factor that is not relevant to your sustainability.
3. Use the *Comments* column to make notes that you can refer to when returning to this worksheet. The notes may have to do with the factor's current level of support, its importance, or your ability to influence.
4. Continuing with the *Assessment* worksheet, score each factor as to their *importance* and *ability*.
  - *Importance* – score how important you believe that factor is to the sustainability of your improved outcomes. The range of importance goes from 1 for having no importance at all, to 5 for being very important.
  - *Ability* – score how able you believe you are to improve that factor's impact on sustainability. The range for ability goes from 1 for not being able to improve it, to 5 for being very able to improve its impact on sustainability.

5. Write the name of those sustainability factors that scored high in both *importance* and *ability* on the *Assessment* worksheet onto the blank spaces in the *Planning* worksheet. Scores of 4 and 5 should be considered high. It may be most effective to initially limit the number of factors you transfer to the planning sheet to 3 or 4. However, it is possible that more than 3 or 4 factors will have high scores. In those instances you will need to decide if you want to first prioritize some factors over others, or decide to focus on more than 3 or 4 from the start. Our experience has been that this has been easily decided in the discussions that arise during the process of completing the worksheets.
6. Complete each row on the *Sustainability Planning* worksheet for those factors that you have written in.
  - *Sustainability Activities* – list activities that you believe will increase the likelihood that the factor will have a positive impact on sustainability.
  - *Lead staff* – list who will be responsible for the activities for this factor.
  - *Timeframe* – list when the activities will start and end (or note if ongoing).

#### NOTES:

1. The worksheets list 12 sustainability factors. These are best thought of as a *menu* of factors and not a *to do* list. The objective is to review the 12 factors and then determine which 3 or 4 (or more) factors are most likely to help with sustainability.
2. The worksheets are designed to initially be completed using the information that is currently available to you. Both the assessment and planning sheets can usually be filled out during a single meeting time. More detailed assessment and planning can be undertaken as needed.
3. This list of factors may or may not address all of the factors that are important for a given project. Additional sustainability factors can be added to the worksheets if this will help with planning.
4. Many of the factors have subsets. For example, *Organizational Infrastructure* includes numerous components such as job descriptions, business model, systems, etc. It may be helpful to list these subsets separately when planning your sustainability activities.
5. A factor may also have a number of different groups it refers to. For example, *Perceived Value* can refer to the value that is attributed to the improved outcomes by leaders, providers, or community members. It may be helpful to break these populations out separately when planning your sustainability activities.