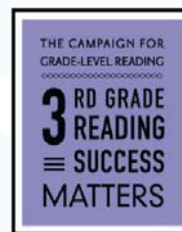


The Campaign for Grade Level Reading

Financial Sustainability: *Key Drivers*

August 8, 2012



Opening Remarks

The Campaign for Grade-Level Reading

3rd GRADE READING SUCCESS MATTERS



Today's Agenda

What	Who	When
Opening Remarks	The Campaign for Grade Level Reading	1:00 – 1:10
Financial Sustainability: Key Drivers	Community Wealth Ventures	1:10 – 1:30
Peer Learning: Local Site Perspective	Central New York Community Foundation, Inc.	1:30-1:40
Discussion	All participants (lead by Community Wealth Ventures)	1:40 – 1:55
Tools for Action / Next Steps	Community Wealth Ventures	1:55 – 2:00

Who Is Community Wealth Ventures?

Community Wealth Ventures (CWV) is a management consulting firm...

that **emboldens and equips** leaderships teams...

to **innovate, grow and sustain** impact.



Objectives

■ Objective of First Three Webinars:

- Network members will gain:
 - Knowledge on how to approach the sustainability of a campaign
 - Steps to begin creating a financial sustainability plan

■ Today's Objectives:

- Discuss drivers of sustainability and components of a financial sustainability plan
- Discuss a peer site experience: Central New York Community Foundation, Inc.
- Share tools for action

Financial Sustainability Webinar Schedule

Session #1

- Drivers of sustainability
- Components of a sustainability plan

Today

Session #2

- Model for economic viability: resources, operating costs, revenue streams

September 12

Session #3

- Funder stakeholder engagement

October 10

Quick Poll: Who is on the line?

- Which region are you calling in from?
 - Northeast
 - Midwest
 - West
 - South

- Which best describes you?
 - School/school district
 - Library
 - Government agency
 - Nonprofit organization
 - Funder
 - Other

First, What is Sustainability?

Sustainability means your community does, and is positioned to continue to, create long lasting and relevant social impact on 3rd grade level reading.



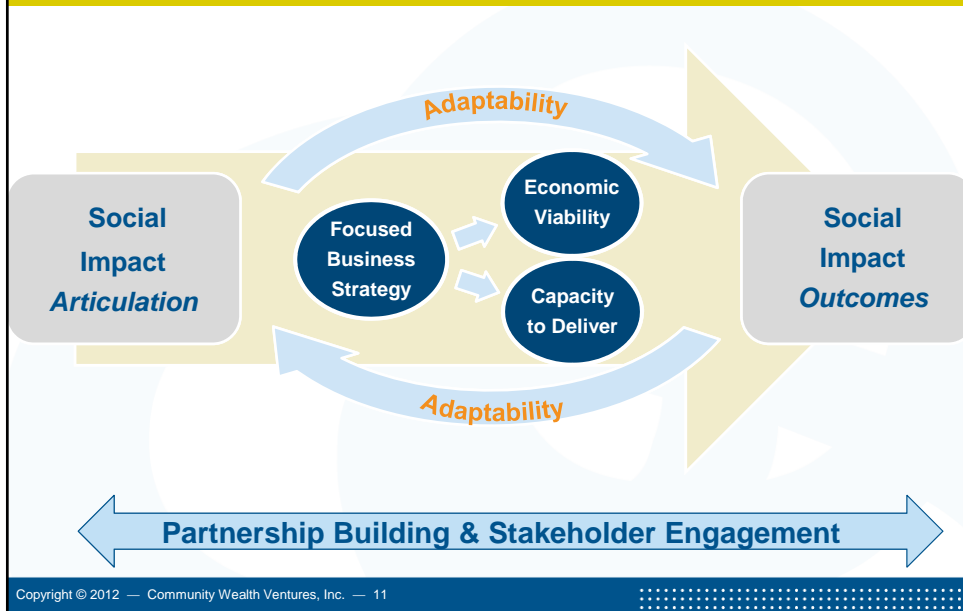
Three Sustainability Myths

1. Sustainability is only about money.
2. Sustainability is an end point.
3. Sustainability is achieved through growth.

Sustainability Insights: Keys to aligning people, time and money

1. Change the conversation with partners
2. A bold & believable vision shared among stakeholders
3. A long-term focus with many short-term wins
4. Responsiveness to the market (stakeholders, constituents)
5. Adaptive nature and learning culture grounded in data

Sustainability Framework: Six Key Drivers of Sustainability



Six Key Drivers of Sustainability

- **Social Impact:** *Results* of efforts taken by campaigns that solve or positively advance social issues by **producing a positive change** in *attitude, behavior* or *condition* for the target constituency.
- **Focused Business Strategy:** *Understanding* of what has to happen to achieve the campaign's social goals and **choices** the campaign makes about **how to accomplish those goals**.

Six Key Drivers of Sustainability

- **Economic Viability:** *Financial health* of the campaign; sustainable campaigns have a *surplus* or *breakeven operating model* that support its work for the long-term.
- **Capacity to Deliver:** *Talent, direct services,* and *support services* needed to *execute* the *business strategy* and achieve *social impact*.

Six Key Drivers of Sustainability

- **Adaptability:** The *discipline* of *updating and/or developing* solutions *in anticipation or response to changes* in constituent needs, behaviors, and the operating environment.
- **Partnership Building and Stakeholder Engagement:** The identification of *a cohort of well-functioning, diverse partners and stakeholders who collaborate and communicate effectively to advance* the efforts of the campaign.

The 6 drivers of sustainability are the core of your financial sustainability plan



Quick poll: What are your strongest elements of sustainability?

■ We are strongest at:

- **Social Impact Articulation:** Why do you do what you do?
- **Focused Business Strategy:** How do you do what you do?
- **Economic Viability:** What supports what you do?
- **Capacity to Deliver:** What enables you to do what you do?
- **Adaptability:** When do you change what you do?
- **Partnership Building and Stakeholder Engagement:** Who partners/collaborates with you for results?

■ We need to strengthen:

- **Social Impact Articulation:** Why do you do what you do?
- **Focused Business Strategy:** How do you do what you do?
- **Economic Viability:** What supports what you do?
- **Capacity to Deliver:** What enables you to do what you do?
- **Adaptability:** When do you change what you do?
- **Partnership Building and Stakeholder Engagement:** Who partners/collaborates with you for results?

Peer Learning: Local Site Perspective

Frank Ridzi

Director, Research & Community Initiatives



CENTRAL NEW YORK
COMMUNITY
FOUNDATION, INC.

Where the Smart Money Gives.

For Discussion

- Can you share an example in your community of a success you've had or challenge you've overcome related to any of these drivers?
- What questions do you have about your experience with these components of sustainability?



Tool for Action

■ Tool for Action

– Financial Sustainability Plan Brainstorming Worksheet

• *Reflects on:*

- **Social Impact Articulation:** Why do you do what you do?
- **Focused Business Strategy:** How do you do what you do?
- **Economic Viability:** What supports what you do?
- **Capacity to Deliver:** What enables you to do what you do?
- **Adaptability:** When do you change what you do?
- **Partnership Building and Stakeholder Engagement:** Who partners/collaborates with you for results?

Upcoming

■ Second Webinar: September 12th at 1:00PM (ET)

- **Focus:** Model for economic viability: resources, operating costs, revenue streams

■ Third Webinar: October 10th at 1:00PM (ET)

- **Focus:** Funder stakeholder engagement

For Further Information

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