

Sustainability Planning and Business Planning Compared*

KEY MODULES/KEY ELEMENTS	SUSTAINABILITY TOOLKIT	APLOS BUSINESS PLAN
Needs Assessment/ Analysis	<ul style="list-style-type: none"> • Complete Sustainability Self-Assessment (focuses on leaders' vision, available resources, funding, community support, key champions, adaptability to changing conditions, internal systems strength, written plan). <p>(Module I)</p>	<ul style="list-style-type: none"> • Describe the need. • Quantify the need. • Identify who else addresses the need. • Identify exactly who you serve.
Vision, Purpose, and Anticipated Results	<ul style="list-style-type: none"> • Identify what you wish to sustain. Identify the results you wish to achieve, and use a logic model and theory of change to guide actions. <p>(Module II)</p>	<ul style="list-style-type: none"> • Describe clearly and succinctly what you are doing to meet the identified need — “The Elevator Pitch.”
Strategic Financing	<ul style="list-style-type: none"> • Document how financial resources match activities. • Estimate fiscal needs. • Identify current resources. • Assess funding gaps. 	<ul style="list-style-type: none"> • Identify where you anticipate the non-profit will be in the future. • Document assumptions that will affect your finances. • Document income + operating expenses + assets + liabilities.

* Resources for Comparison: *Sustainability ToolKit* Modules and *APLOS Writing a Business Plan* Framework.

<https://www.aplos.com/training/courses/how-to-write-a-nonprofit-business-plan/lessons/why-you-need-a-nonprofit-business-plan/>

KEY MODULES/KEY ELEMENTS	SUSTAINABILITY TOOLKIT	APLOS BUSINESS PLAN
	<ul style="list-style-type: none"> • Identify and evaluate funding sources and strategies. (Module III)	
Organizational Capacity and Community Support/Management Team and Board	<ul style="list-style-type: none"> • Conduct environmental scan of political and economic conditions; demographic changes; related organizations. <ul style="list-style-type: none"> ○ Conduct self-assessment of your ability to adapt to changing conditions. ○ Identify adaptation strategies. • Assess community support. <ul style="list-style-type: none"> ○ Brainstorm community engagement strategies. • Assess key champions. <ul style="list-style-type: none"> ○ Strategies to cultivate key champions. • Assess internal systems. <ul style="list-style-type: none"> ○ Strategize to strengthen internal systems. (Module IV)	<ul style="list-style-type: none"> • Select leadership/management team based upon skills, experiences, and resources. • Articulate leadership/management team's roles, responsibilities, authority, and communication protocols. • Assess personnel needs, and consider and plan for future human resources. • Develop plan for recruiting, screening, selecting, and hiring.
Written Plan	<ul style="list-style-type: none"> • Write a roadmap for change including priority strategies and milestones. • Develop a workplan for each strategy. 	<ul style="list-style-type: none"> • Include the following sections: <ul style="list-style-type: none"> ○ Executive Summary ○ Organization description ○ Needs analysis ○ Product/ service

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	<ul style="list-style-type: none"> • Use your Sustainability Plan as a management tool and a public relations tool. • Review and revise the written plan based upon data you have identified as important to collect, and upon changing conditions. (Module V)	<ul style="list-style-type: none"> ○ Marketing strategy ○ Management team/board ○ Human resources ○ Finances.
Executive Summary	<ul style="list-style-type: none"> • Write after initial planning is complete, and revise as needed. (Module V)	<ul style="list-style-type: none"> • Write after planning is complete. • Include statements of: <ul style="list-style-type: none"> ○ Mission; ○ Impact; ○ Financial Overview; and ○ Keys to Success

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