

Finance Project Sustainability ToolKit Summary from May 29, 2018 call

Participating in the call: Cindy Findley, Doris Green, Nadine Walter, Sharon Johnson, Cheryl Smith, Jill Kagan, and Susan Summers

The meeting began with a check-in from member states. Each state shared activities they engaged in from the five ToolKit modules. Participants asked questions and offered information in a discussion format.

Key Themes Discussed

Planning Group/Coalition Issues

- Forming a group from broad and diverse backgrounds helps. It may be difficult to get high-level state decision-makers at the table. Make sure partners not only understand respite, but also have access to supervisors.
- Find and engaging planning members is challenging. Even getting everyone on the phone for a call or finding money to support travel for non-profit partners may be difficult.

and Helpful Suggestions

- Jill suggests including coalition partners who are truly committed. Identify the primary partners most invested and will assume responsibility for getting the work accomplished.
- Sharon seconded the importance of using a smaller committed group to do the meat of the work, and the larger group to respond to drafts in a back-and-forth process of refining sustainability planning documents.
- Sharon shared information about Thrivent, a national, faith-based organization that makes funds available for benevolent causes. <https://www.thrivent.com/?origDomain=GTM:thrivent.org>;
- Build relationships by having repeated conversations about the need for respite and the relevance to coalition members (or potential members) to work or mission. This process requires time but results in an acquired wisdom as members learn about and from one another.
- Cheryl described how she used a smaller core group to produce a white paper.

Presentation by Nadine Walter

Nadine started us off by providing a brief history of respite in Oklahoma, and spoke about her experience using the ToolKit. Oklahoma has broad participation from 126 partners and eight subcommittees. Sub-committees report to the overall committee, and are a priority in Oklahoma. Nadine described how the 13 members of the transportation subcommittee were unaware of each other's existence prior to the meeting.

As Nadine read through the ToolKit module she realized the need for a more general strategic plan, and she located a group that does strategic planning and logic model development. Ten to 12 planning members from their coalition

executive committee with Nadine as the touch-point for communication developed the logic model in two days to expedite the planning process.

- The group discussed the need to know and return to all the modules in the ToolKit so that when you vary the process, you will include all aspects of the ToolKit in planning.
- The group also discussed the importance of refocusing and returning to the questions:
What are we wish to sustain?
How do we sustain coalition activities if funding goes away?
- Cheryl shared that they periodically do a SWOT to help assess where they are and refocus on the task.

Our next Meeting is July 27th, noon Eastern Time.

Meetings may be as brief or as long as we need, and will include a semi-structured check-in with participants and free-for-all support for one another's work.

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