

Building Your Future

SOAR Sustainability Self-Assessment and Funding Plan Template

The SOAR TA Center is pleased to provide this two-part tool designed to help you assess and plan for actions to sustain and grow SOAR in your state, region or locality. These tools should be used with the [Funding and Sustainability](#) resources on the SOAR website and should be discussed with your [SOAR TA Center Liaison](#) who can provide individual support specific to your needs.

Tool #1: SOAR Sustainability Self-Assessment

Assess and understand the current financial health of your SOAR program.

Directions: Answer these guided questions to the best of your ability. This assessment is meant to be completed by those responsible for the sustainability of SOAR programs as a part of steering committee activities.

- Action Plan:** Financial stability needs to be *planned* for. SOAR programs (small/large, new/seasoned) should have a concrete funding action plan with goals, objectives, responsible parties and deadlines.

Does your SOAR program currently have a funding and sustainability timeline? (This could be a stand-alone document or a part of a broader strategic/action plan) ___ Yes ___ No

- Specificity:** While your funding plan does not need to be unnecessarily complicated, it should have enough detail to be valuable.

Your funding plan should include the following components (Check all that apply):

- | | |
|--|--|
| <input type="checkbox"/> Planning for multiple years
<input type="checkbox"/> Strategies for multiple funding sources
<input type="checkbox"/> Measurable action steps
<input type="checkbox"/> Input from all necessary stakeholders | <input type="checkbox"/> Completed/approved by steering committee
<input type="checkbox"/> Action assignments to responsible parties
<input type="checkbox"/> Deadlines for completion of action items
<input type="checkbox"/> Schedule for regular revision |
|--|--|

- Diversification:** A financially healthy program is one that is receiving funding from multiple sources. Programs should be positioned where SOAR activities would continue even if one funding source stopped.

What type(s) of funding is your SOAR program currently accessing or planning to access as a part of your funding action plan? (Check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Federal (e.g. CABHI, PATH)
<input type="checkbox"/> Medicaid
<input type="checkbox"/> State/Local
<input type="checkbox"/> Foundations | <input type="checkbox"/> Corporate (e.g. pharmaceutical company)
<input type="checkbox"/> Specialized (e.g. local plans to end homelessness)
<input type="checkbox"/> Fundraising activities (e.g. silent auctions, golf tournaments) |
|--|---|

- Cost of Services:** Prior to reaching out to organizations to access funding for your SOAR program, you should know the cost of the services you are proposing to provide. ([Sample budgets](#)).

Do you have an updated budget specific to the services you provide? ___ Yes ___ No

5. Collaboration: The financial success of your program depends on community collaborations (e.g. human services or medical records). In order to grow, you may need to make some new connections (e.g. criminal justice, hospitals).

Based on plans to expand SOAR activities, with what organizations do you plan on building relationships?

6. Marketing: It is important to adequately market your services to the audiences on whom you depend. Consumers must know how to access your services and potential funders and policymakers must understand the importance and benefits of your work. (e.g. Local legislators may need to learn how SOAR can bring federal dollars into the local economy; or, local hospitals may need to understand how SOAR can help their facilities recoup retroactive Medicaid payments.)

Who needs to know about our SOAR program and how are we going to inform them?

7. Champions: It ‘takes a village’ to grow a SOAR initiative! You want leaders in your community who are “SOAR Champions” (e.g. legislators, agency leaders, philanthropists, local celebrities, etc.). Regardless of their role, it is important that these champions are able to influence decision makers (i.e. funders, policy makers) towards desired outcomes for your initiative.

Who are your current champions or potential leaders? What do they bring to the table?

8. Preparation: Be prepared for funding opportunities that have short application periods. While every opportunity is unique, there are some general requirements. Update and collect these common materials on a regular basis so you can more easily respond to funding opportunities when they arise.

Which items do you already have prepared?

- Project summary: Overview of SOAR (how it works, who it helps, what you hope to accomplish)
- Background: Your agency’s history and mission. Include challenges you address and populations served (include key demographics)
- Current programs and accomplishments: Include recent achievements and number of staff/volunteers
- Organizational relationships/collaborations/partnerships (both formal and informal)
- Draft funding request ([SOAR Sample Proposal](#))
- Steering committee/Board meeting minutes covering at least one year
- Examples of recent articles about, or evaluations of, your organization

Financial Information:

- | | |
|--|---|
| <input type="checkbox"/> Recent financial statements | <input type="checkbox"/> Board of Directors (or steering committee) |
| <input type="checkbox"/> Current funding sources | <input type="checkbox"/> Most recent IRS letter indicating your agency’s tax status |
| <input type="checkbox"/> Sample project budget | <input type="checkbox"/> Resumes/bios of key staff, including qualifications |
| | <input type="checkbox"/> Most recent annual report |

Tool #2: SOAR Funding Plan Template

Develop an action plan to sustain and/or grow your SOAR activities.

Goal 1: Increase the Visibility of SOAR		
Increase the visibility of the state's SOAR program through partnerships, social media/social marketing, and sharing SOAR outcomes with individuals, government, and the community.		
Measurable Objective	2016	2017
Create a social media presence for state SOAR activities	1 - new platform	1 - new platform
Create/update marketing materials for different audiences	2 - new infographics	2 - new infographics
Develop new ways to identify and engage SOAR 'Champions'	1 - new champion	2 - new champions
Action Steps	Lead Person	Timeframe
Priority 1: <ul style="list-style-type: none"> ▪ Investigate the most useful social media platform to achieve desired results <ul style="list-style-type: none"> ○ Look into best practice uses of social media for similar human service programs - choose 2 products ○ Review final choices with Steering Committee, soliciting input ○ Make final determination about the two platforms ▪ Create a simple and easy to understand social media policy. Identify a schedule for posting material (one post per day) <ul style="list-style-type: none"> ○ Tailor the guidance from sample social media policies (SOAR TA Center and other sources) ○ Draft social media policy that will be reviewed, edited and approved by the steering committee ▪ Start posting material using the posting frequency schedule ▪ Evaluate outcomes monthly <ul style="list-style-type: none"> ○ Collect and report on the analytics to the SOAR Steering Committee ○ Based on the outcome of the analytics, alter social media plan and policy accordingly 	Holley Davis Holley Davis and SOAR Steering Committee Holley Davis and Brian Brown Holley Davis and SOAR Steering Committee Holley Davis Holley Davis and Jane Smith Brian Brown	August-September 2016 September-October 2016 November 2016 November 2016-Ongoing As scheduled Monthly
Priority 2: <ul style="list-style-type: none"> ▪ Speak w/ SOAR TA Center Liaison about sample materials <ul style="list-style-type: none"> ○ Use data collected from OAT ○ Make different versions of the materials based on the target audience (hospitals, policy makers, medical professionals, service providers) ○ Review materials, revise based on input ▪ Distribute materials at local events and through social media ▪ Update materials on an annual basis based on new OAT outcomes and any programmatic changes 	Holley Davis Holley Davis and SOAR Steering Committee All Staff and Steering Committee	August-September 2016 October 2016 October 2016 - Annually
Priority 3: <ul style="list-style-type: none"> ▪ Choose 3 "champions" who are likely to support SOAR efforts <ul style="list-style-type: none"> ○ Make three recommendations for each category, 1) policy maker 2) human service providers and 3) a person directly connected with a funding source ○ Identify best way to engage and recognize the individual for their contributions (e.g. join the Steering Committee, give them an award, recognition on website) ○ Implement plans based on the discussions above 	SOAR STL SOAR STL and Steering Committee SOAR STL and Steering Committee TBD	August 2016 August 2016 August 2016

