Thriving in Times of Change: Opportunities and Challenges to Ensuring Program Sustainability

Adapted from materials developed by La Piana
Purpose of Presentation

By the end of the workshop, participants will be able to:

- Understand the difference between planning and strategy development for sustainability
- List five principles of strategy formation
- Practice using tools to draft an identity statement and assess an organization’s competitive advantage as it applies to activities along the HIV care continuum
- Walk away with tools and resources to apply principles of strategy formation to develop an organizational plan for sustainability
Welcome
Strategy vs. planning
Five principles
- Principles of Strategy Formation
Group activities
- Evaluating and Selecting Strategies
- Identifying Competitive Advantage
- Getting to Sustainable
Wrap up
- Questions and Discussion
Welcome and Introductions

- Name
- Organization
- Icebreaker
What does it mean to be sustainable?

*Group Discussion*
Case Study: Hope Meadows

- Established in 1988
- Five locations in Virginia
- Provides non-medical services to approximately 4,500 clients
- Reliant on CDC and health department funding, as well as some earned revenue and fundraising events
- Considering partnerships to provide clients full continuum of care services
Strategy versus planning

If strategy is not planning....what is strategy?

Strategy: Where you are headed
Planning: How you will get there
The Five Principles of Strategy Formation

1. Know Yourself
2. Know Your Market
3. Build On Your Strengths
4. Make Decision Making Explicit
5. Identify Your Big Question(s)
Identity Statement

- Where we work
- How we do our work (programs)
- Who we serve
- How we are funded

Mission

Competitive Advantage
Identity Statement Worksheet – Activity #1
Hope Meadows Identity Statement

1. Know Yourself

- Where we work
- How we do our work
- Who we serve
- Funding

Mission

Competitive Advantage
Hope Meadows Identity Statement

Where we work
Urban and rural locations
Most locations situated near bus lines

How we do our work
Counseling, testing, nonmedical and medical case management, insurance continuation program assistance

Who we serve
Individuals with or at risk for HIV/AIDS

Funding
CDC, state Health Department, Medicaid
Earned revenue from counseling and testing services
Special event fundraising
Individual and corporate donations

Save lives through HIV/AIDS treatment & prevention

Trusted, accessible provider
Know
Your Market 2
Key Questions: Competitive Landscape

- Who are our competitors
- Where are they strong?
  - How do we compare?
  - Where are we strong?
Key Questions: Trend Analysis

- What trends or changes in the environment are likely to impact your organization (or those you serve) as you move forward?

- What are the implications for what you do? How you do it? How you are funded?
Market Research Worksheet – Activity #2
<table>
<thead>
<tr>
<th>Type of Trends</th>
<th>Direction of Trend</th>
<th>Description and Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demands for or interest in for your programs/services</td>
<td>Needs/demands are</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Increasing</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Decreasing</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Staying about the same</strong></td>
<td></td>
</tr>
<tr>
<td>Available funding for your programs/services</td>
<td>Funding is</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Increasing</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Decreasing</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Staying about the same</strong></td>
<td></td>
</tr>
<tr>
<td>Other trends impacting your organization. Consider:</td>
<td>Identified trends are</td>
<td></td>
</tr>
<tr>
<td>HIV epidemic trends</td>
<td><strong>Increasing</strong></td>
<td></td>
</tr>
<tr>
<td>Changes in your service area/target population demographics</td>
<td><strong>Decreasing</strong></td>
<td></td>
</tr>
<tr>
<td>Health care/public health environment</td>
<td><strong>Staying about the same</strong></td>
<td></td>
</tr>
</tbody>
</table>
## Partner Screening Tool

### Sample Partner Screen

**Worksheet**

Complete this tool to help you determine the best partners for your organization as well as identify those that may not be a good match.

1. **Does this partner share our guiding principles?**

2. **Do this partner’s core competencies, knowledge, and skills complement ours?**
   - a) What will we gain by working together?
   - b) What will they gain by working together?

3. **Does the role that we would play with this partner leverage our competitive advantage? In what way(s)?**

4. **Do we share agreement with the proposed partner on substantive policy goals and desired outcomes?**

5. **Are the partners’ and our organization’s proposed roles defined in a way that is clear, measurable and time limited? What is the time horizon for the partnership?**
3

Build on Your Strengths
Key Questions: Competitive Advantage

- Where are we uniquely strong?
- Does this truly distinguish our organization from others?
- Would clients, funders, and the public agree?
Competitive Advantage – Activity #3
### Worksheet

Complete this worksheet for each of the stages in the HIV Care Continuum.

<table>
<thead>
<tr>
<th>Question Area</th>
<th>Continuum Stage Addressed (choose one)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What is our role in this stage?</strong></td>
<td>_Diagnose _Link to Care _Retain in Care _Maintain on ART _Viral Suppression</td>
</tr>
<tr>
<td>Address informally</td>
<td></td>
</tr>
<tr>
<td>Address via a formal program/effort</td>
<td></td>
</tr>
<tr>
<td>Provide through a defined partnership</td>
<td></td>
</tr>
<tr>
<td>Refer to other agencies</td>
<td></td>
</tr>
<tr>
<td>Don't address</td>
<td></td>
</tr>
<tr>
<td><strong>What are our core strengths in this area?</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Do others provide these services? (Direct competitors)</strong></td>
<td></td>
</tr>
<tr>
<td>What organizations/efforts?</td>
<td></td>
</tr>
<tr>
<td>To what target populations?</td>
<td></td>
</tr>
<tr>
<td>In what way are other providers</td>
<td></td>
</tr>
<tr>
<td>exceptional in providing the service?</td>
<td></td>
</tr>
</tbody>
</table>

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1. If no one else provides the service, note what your weaknesses/challenges are. Consider your approach, your competence with the target audience, accessibility of your services in terms of geography, hours, or language, data gathered on program effectiveness, etc.
4 Make Decision Making Explicit
Opportunity Screen

- Does it help us advance our mission?
- Does it leverage our competitive advantage?
- Can we pay for it? How?
- Do we have the internal capacity to take this on?
- Are we the best organization to take this on?
What else might Hope Meadows include in its opportunity screen?

*Group Discussion*
5 Identify Your Big Questions
Assess Opportunities

- Identity Statement
- Partner Screen
- Opportunity Screen
Understand the Environment

- Identify needs and demands
- Review the competitive landscape
  - Overall capacity
  - Unmet need
  - Potential competitors or collaborators
Consider...

- Likely outcome/impact
- Operational implications
- Financial implications
Answering your Big Question: Potential Next Steps

- Significant change to business model
- Launch of a new program, partnership, or entity
- Growth strategy
Strategic vs. Organization Planning

**Strategic Planning**
- **Develop** organizational responses to opportunities and challenges (#1 Know Yourself)
- **Articulate** a strategy (#2 Know Your Market)
- **Determine** a means to increase mission impact (#3 Build on Your Strengths)
- **Define** a program model (#4 Make Decision-making Explicit)
- **Confirm** the need for a business change (#5 Identify the Big Questions)

**Organizational Planning**
- **Test** the economic logic and operational feasibility of a proposed response
- **Test** the assumptions that prove the change is feasible
- **Test and elaborate** on the core elements of the strategy
- **Show** how the model will be viable
- **Describe** the how and why of success
Where is your organization?

1. Know Yourself
2. Know Your Market
3. Build On Your Strengths
4. Make Decision Making Explicit
5. Identify Your Big Question(s)
Review of Tools

- Identity Statement Worksheet
- Market Research Worksheet
- Sample Partner Screen
- TOWS Worksheet
- Competitive Advantage Worksheet
- Opportunity Screen

Tools are posted on CBA@JSI.com
Thank you!

cba.jsi.com