PIRE

SUSTAINABILITY READINESS WORKGROUP TRAINING AND TECHNICAL ASSISTANCE GUIDE

2019

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Using the Training and Technical Assistance Guide

This guide is designed for use by trainers and technical assistance (TA) providers to prepare and implement a one-day training workshop and subsequent TA for sustainability workgroup members. The training and TA will be provided to members of sustainability workgroups that are part of organizations that are implementing evidence-based prevention interventions (EBPIs). The sustainability workgroups will be implementing the 2019 sustainability strategy developed by the Pacific Institute for Research and Evaluation (PIRE). This training workshop is set up for a sustainability workgroup from a single EBPI implementing organization or for a state system training by regions of the state. There are small implementation differences in protocols, depending on whether it is a single EBPI implementing organization or a state regional training.

Prior to using this guide, the trainers and TA providers shall first become thoroughly familiar with the Sustainability Toolkit and the Excel tools that accompany the toolkit. After becoming familiar with these materials, they shall read this entire guide before the workshop to be administrated by PIRE.

There are three main sections to the guide:

Section 1A: Training Guide for a Single EBPI Implementing Organization Workgroup Training

The first Training Guide (in Section 1A) is designed specifically for providing a one-day workshop to a sustainability workgroup from a single EBPI implementing organization.

Section 1B: Training Guide for a Training of Multiple Workgroups

The second Training Guide (in Section 1B) is designed specifically for providing a one-day workshop to multiple workgroups from EBPI implementing organizations or to a set of EBPI implementing organizations from a region of a state.

Both Training Guides include an introductory section that describes the purpose of the training, provides an outline, and presents additional details related to the training. These include: objectives, time required, participants, course supplies, training site, equipment and materials, refreshments, registration, and participant packets and handouts. Next, the Workgroup Training section lays out the content that makes up the agenda for this one-day training. The agenda corresponds to a set of PowerPoint presentation slides that will walk the participants through 11 Getting to Outcomes® (GTO®) Sustainability Readiness Questions that stem from an evidence-based planning and implementation model in the literature. We have revised this model as the sustainability process for the Sustainability Toolkit. (See Toolkit for literature on GTO.) Getting to Outcomes is a registered trademark of the RAND Corporation.

Section 2: Technical Assistance Guide

The Technical Assistance Guide includes an introductory section that describes the purpose of the TA, describing details of two types of TA contacts—scheduled TA contacts and drop-in TA calls. This section also includes suggestions for documenting what occurs during TA provision to the workgroups.

Appendix A: Sustainability Workgroup Training PowerPoint Slides

Appendix A includes all PowerPoint slides needed to deliver the training.

Section 1A: Training Guide for a Single Workgroup Training

Introduction

Purpose of Training

The purpose of this training is to provide EBPI implementing organizations' sustainability workgroup members with the needed information, materials, and understanding to implement the sustainability strategy to sustain EBPIs (evidence-based prevention interventions).

Training Outline

The training is designed for implementation as a workshop in one 7-hour day, including adequate breaks.

The main topics to be covered are:

- Background
- Course materials
- Introductions of presenters and participants
- What is sustainability? Why is sustainability important?
- Key terms
- Logic model
- Sustainability Readiness Questions
- Completion calendar
- Individual presentation of the 11 questions highlighting for each question:
  - Purpose
  - Calendar
  - Tasks and tools to be completed
  - Blank and completed tools
  - Agendas for workgroup meetings
- Excel tool demonstration for selected Sustainability Readiness Questions

Objectives

All workgroup members need to participate in the one-day training workshop; and will:

- Gain familiarity with and become comfortable using all the sustainability materials.
- Demonstrate a working understanding of all terms, concepts, tasks, and tools needed to plan, implement, and monitor implementation of the sustainability process
- Demonstrate knowledge and proficiency in the step-by-step adapted GTO^{TM} sustainability process.
- Develop a follow-up plan that includes:
  - Future meeting dates, locations and times.
  - Names and contact information for those who will help move the sustainability process forward.
  - Plans with dates, times, and methods for follow-up technical assistance.

Time Required

The training workshop is designed for implementation in one 7-hour day (9:00 AM to 4:00 PM) with morning and afternoon breaks of 15 minutes each and a one-hour working lunch.

Participants

All workgroup members, including the facilitator and the data coordinator from each sustainability workgroup, shall attend the training workshop.

Course Supplies

One set of the following materials is needed for each workshop participant:

- Sustainability Toolkit (bound copy)
- Flash drive with Excel versions of tools
- Participant packet (a specific list of materials is included later in this guide)

Training Site

The lead trainer shall arrange access to a training site that is comfortable, well lit, convenient to participants, accessible to persons with disabilities, and conducive to a positive training experience for all. The site shall be open and available for the trainer to set up a minimum of one hour before the start of the training.

The training room itself shall include adequate space for participants, large enough to allow everyone to be comfortably seated and to move around and interact with one another. As a helpful guideline, we recommend providing approximately 50-60 square feet per participant. Because of the participatory nature of the training, it's essential that tables and chairs be movable. We recommend that participants be seated at round tables, with no one's back to the trainer. If only long tables are available, they shall be arranged in a fashion that allows everyone to see the trainer easily while seated and minimizes the likelihood that participants will be seated behind one another. Classroom seating should be avoided.

The training room shall have controllable heating and cooling with clear access for the trainer to set and adjust the room temperature. The training room shall also have walls on which participants may post large flip chart paper sheets during the workshop session. If necessary, secure permission to use masking tape on the training room walls prior to booking a training site.

A rectangular table shall be set up at the front of the room for the trainer's materials and notes. Set up a second table accessible to participants at the beginning of the workshop and during breaks on which resources may be placed. A separate table or projector stand is needed for the overhead projector or data projector (see Equipment and Materials list below).

Equipment and Materials

The following equipment and materials shall be present in the training room prior to the start of the one-day training:

- LCD monitor/projector and projector stand. Note: If an LCD monitor is not available, an overhead projector and projector stand need to be provided.
- Large screen
- Extra projector bulb
- Extension cord
- Two flip chart stands with full easel pads of flip chart paper
- Markers, a minimum of two dozen fresh, nontoxic, water-based markers in bright, strong colors
- Small pads of Post-It® notes
- Masking tape
- Extra pencils and paper
- Microphone. Note: This is optional depending on the size and acoustics of the training room and the number of workshop participants—to be determined in consultation with the trainer.
- All handouts and materials

Refreshments

Appropriate refreshments will be available to participants as they arrive and during breaks. If possible, the break service shall be set up within the training room in a way that does not impede participant movement during the training. Drinking water shall be available either in the break area or on the tables where participants are seated. Lunchtime arrangements shall be made ahead of time to facilitate a working lunch session.

Registration

Set up and administer participant registration and provide nametags and/or name tents with participant names in large readable type.

Participant Packets and Handouts

Each participant shall have a complete copy of the Sustainability Toolkit, the Excel flash drive with all the tools on it, as well as other materials specified in the folder list below.

The trainer will provide handouts for each participant using a high-quality copier or commercial copy service. We recommend that single-sided copies be made on paper of varied colors to create a more interesting presentation and to assist the trainer and participants in locating specific handouts.

For each participant, copy and prepare a set of the following handouts, placing them in a pocketed folder in the following order:

On the left side of a participant folder:

- Training agenda (H-1)
- Definitions of Terms (H-2)
- Logic Model (H-3)
- Sustainability Readiness Questions (H-4)

On the right side of the participant folder:

- PowerPoint slides copied as a handout for note taking (H-5)

- TA Planning Form (H-6)

The participant folders may either be distributed as participants register or placed on tables prior to registration.

H-1 Agenda - Workgroup Member Training

9:00 – 9:15	Introduction
9:15 – 9:30	Adapted GTO Sustainability Process
9:30 – 10:15	Adapted GTO Q-1: SELECT EBPIs
10:15 – 10:30	Morning Break
10:30 – 11:00	Adapted GTO Q-2: PRE-READINESS ASSESSMENT
11:00 – 11:30	Adapted GTO Q-3: OUTCOMES
11:30 – 12:00	Adapted GTO Q-4: ACTIVITIES
12:00 – 1:00	Working Lunch – Adapted GTO Q5 & Q6: FIT & RESOURCES
1:00 – 1:30	Adapted GTO Q-7: PLAN
1:30 – 2:00	Adapted GTO Q-8: IMPLEMENTATION MONITORING
2:00 – 2:20	Adapted GTO Q-9: POST-READINESS ASSESSMENT
2:20 – 2:35	Afternoon Break
2:35 – 3:00	Adapted GTO Q-10 CONTINUOUS QUALITY IMPROVEMENT (CQI)
3:00 – 3:30	Adapted GTO Q-11: SIX MONTH FOLLOW-UP
3:30 – 4:00	Questions from Participants, Closing

Follow-Up to Workgroup Member Training – Within one week of the training, we will hold a 1-hour conference call with people in the following four roles on the Workgroup: (1) the Workgroup Facilitator, (2) another member who will serve as a backup Workgroup Facilitator, (3) the Data Coordinator, and (4) another member who will serve as a backup Data Coordinator. This 1-hour call will include information specifically for these members of the workgroup.

Workgroup Member Training Content

Table 1 provides details of what will be covered in each section of the training, including PowerPoint slide numbers. The PowerPoint slides appear in the Appendix.

Table 1. Training for a workgroup from a single EBPI implementing organization.

PowerPoint Slides (Agenda Section)	Slide Contents
Introduction	
1. Title Slide	**Sustainability Workgroup Training** **Date** **Location**
2. Introductions	• Introduction of trainers • Introduction of workgroup
3. Training Objectives	• Prepare sustainability workgroup facilitators for directing strategy implementation • Prepare data coordinators to support implementation • Prepare other workgroup members to actively participate in strategy implementation • Provide all key information and opportunities to practice implementation
4. Agenda Review	• Review of Agenda (see Handout H-1)
5. Sustainability Strategy Materials	• Sustainability Toolkit • Excel versions of tools on flash drive • Contact list for TTA staff • Contact list for external evaluation staff
6. What is Sustainability?	• The process of ensuring an adaptive system including evidence-based infrastructure capacity and strong member advocacy for sustainable evidence-based prevention interventions (EBPIs) that can be integrated into ongoing operations to benefit diverse stakeholders.
7. Why is Sustainability Important?	• Many resources and stakeholder efforts go into designing, developing, implementing, and evaluating prevention interventions that have produced positive results. • It is important for states, territories, tribes, coalitions and other entities to implement and sustain proven prevention interventions.
8. Definitions of Terms	• See Handout H-2 for terms and their definitions in the context of the sustainability strategy.
9. Logic Model	• See Handout H-3 for the sustainability logic model that outlines sustainability effects from the sustainability strategy to impact the desired outcomes.
10. Sustainability Readiness Questions	• See Handout H-4 for the 11 Sustainability Readiness Questions outlined in the table of contents. • These questions are adapted from the Getting to Outcomes ^{TM} (GTO) model, which is an evidence-based planning process that has been used successfully in substance abuse prevention.
11. Completion Calendar	• The completion calendar in the sustainability toolkit shows the workgroup meetings and tasks by meeting, plus the months for each meeting.
Get Started	
12. Get Started - Purpose	• The purpose of Get Started is to complete two main activities. • The first activity is to establish a sustainability leadership committee, which will convene a workgroup of at least six EBPI implementing organization members. • The second activity is to select EBPI(s) to be sustained using the sustainability strategy.
13. Get Started - Calendar	• Meetings 1 and 2 of the workgroup are to take place in months 1 and 2.

PowerPoint Slides (Agenda Section)	Slide Contents
14. Get Started - Workgroup Meetings 1 and 2 Agendas	Meeting 1 • Identify workgroup members • Finalize workgroup membership • Assign workgroup roles • Agree to meeting rules and processes Meeting 2 • Review criteria for EBPIs
Sustainability Readiness Question 1: SELECT EBPI	
15. Sustainability Readiness Question 1: SELECT EBPI(s)	• What EBPI(s) meet the sustainability selection criteria?
16. SELECT EBPI(s) - Calendar	• Workgroup actions around Select EBPI(s) will take place in Meeting 2 in month 2.
17. SELECT EBPI(s) - Workgroup Meeting 2 Agenda	• Discuss criteria for EBPI(s) • Workgroup identifies potential EBPIs for sustainability using two criteria • Workgroup completes Tool 1 • Workgroup selects EBPI(s) using results from tool • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
18. SELECT EBPI(s) - Review of Tool 1 (blank and completed versions)	• Please take this time to review the blank and completed versions of Tool 1
Sustainability Readiness Question 2 (PRE-READINESS ASSESSMENT)	
19. Sustainability Readiness Question 2: ASSESS	• What EBPI implementing organization infrastructure and member advocacy must be assessed to determine if the sustainability strategy is possible? (ASSESS)
20. ASSESS - Calendar	• External evaluation presents the assessment report; Workgroup actions around ASSESS will take place in Meeting 3 in month 3.
21. ASSESS - Workgroup Meeting 3 Agenda	• Data coordinator transfers percentages from brief report provided by external evaluator into Tool 2 • Facilitator leads discussion of report and Tool 2 • Workgroup reviews outcome adequacy ratings in Tool 2 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
22. ASSESS - Review of Tool 2	• Please take this time to review the blank and completed versions of Tool 2.
Sustainability Readiness Question 3 (OUTCOMES)	
23. Sustainability Readiness Question 3: OUTCOMES	• What are the desired outcomes associated with sustainability readiness that constitute the EBPI implementing organization's goal(s) for sustaining EBPIs?
24. OUTCOMES - Calendar	• Workgroup actions around OUTCOMES will take place in Meeting 4 in month 4.
25. OUTCOMES - Workgroup Meeting 4 Agenda	• Workgroup reviews top portion of Tool 3 that shows adequacy levels of readiness outcomes • Workgroup reviews lower portion of Tool 3 that shows outcome statements based on the adequacy levels for the outcomes • Workgroup discusses the results and presents summary to EBPI implementing organization's sustainability leadership committee
26. OUTCOMES - Review of Tool 3	• Please take this time to review the blank and completed versions of Tool 3.
Sustainability Readiness Question 4 (ACTIVITIES)	

PowerPoint Slides (Agenda Section)	Slide Contents
27. Sustainability Readiness Question 4: ACTIVITIES	• What activities can achieve sustainability readiness desired outcomes?
28. ACTIVITIES - Calendar	• Workgroup actions around ACTIVITIES will take place in Meeting 5 in month 5.
29. ACTIVITIES - Workgroup Meeting 5 Agenda	• Workgroup reviews Tool 4 • Facilitator leads discussion of activities to be implemented to achieve desired outcomes as well as delivery mechanisms for the activities • Workgroup completes Tool 4, including selection of delivery mechanisms • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
30. ACTIVITIES - Review of Tool 4	• Please take this time to review the blank and completed versions of Tool 4.
Sustainability Readiness Question 5 (FIT)	
31. Sustainability Readiness Question 5: FIT	• How do the sustainability readiness strategy activities fit?
32. FIT - Calendar	• Workgroup actions around FIT will take place in Meeting 5 in month 5.
33. FIT - Workgroup Meeting 5 Agenda	• Facilitator leads discussion of FIT, including use of Tool 5 • Workgroup completes Tool 5 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
34. FIT - Review of Tool 5	• Please take this time to review the blank and completed versions of Tool 5.
Sustainability Readiness Question 6 (RESOURCES)	
35. Sustainability Readiness Question 6: RESOURCES	• What resources are needed to implement the sustainability readiness strategy activities?
36. RESOURCES - Calendar	• Workgroup actions around RESOURCES will take place in Meeting 5 in month 5.
37. RESOURCES - Workgroup Meeting 5 Agenda	• Facilitator leads discussion of RESOURCES, including the use of Tool 6 • Workgroup completes Tool 6 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
38. RESOURCES - Review of Tool 6	• Please take this time to review the blank and completed versions of Tool 6.
Sustainability Readiness Question 7 (PLAN)	
39. Sustainability Readiness Question 7: PLAN	• What is the plan for impacting sustainability readiness?
40. PLAN - Calendar	• Workgroup actions around PLAN will take place in Meeting 6 in months 6 or 7. • Finalizing the plan may require work during months 6 and 7 of the strategy. • The workgroup may find it beneficial to conduct two workgroup meetings, with each coming after regular sustainability leadership committee meetings, to maximize input.
41. PLAN - Workgroup Meeting 6 Agenda	• Facilitator leads discussion of development of plan • Workgroup completes Tool 7 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
42. PLAN - Review of Tool 7	• Please take this time to review the blank and completed versions of Tool 7. • NOTE: In addition to filling out Tool 7 during workgroup meeting 6, the completion of the fields that show underline actual completion dates for each task shall be done throughout implementation process, but underline before workgroup meeting 7.
Sustainability Readiness Question 8 (IMPLEMENTATION MONITORING)	

PowerPoint Slides (Agenda Section)	Slide Contents
43. Sustainability Readiness Question 8: IMPLEMENTATION MONITORING	• What is the level of implementation quality?
44. IMPLEMENTATION MONITORING - Calendar	• Workgroup actions around IMPLEMENTATION MONITORING will take place in Meeting 7 in month 11.
45. IMPLEMENTATION MONITORING - Workgroup Meeting 7 Agenda	• Facilitator leads discussion of implementation monitoring • Workgroup completes Tool 8 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
46. IMPLEMENTATION MONITORING - Review of Tool 8	• Please take this time to review the blank and completed versions of Tool 8.
Sustainability Readiness Question 9 (POST-READINESS ASSESSMENT)	
47. Sustainability Readiness Question 9: Readiness	• How well did the sustainability plan achieve sustainability readiness?
48. READINESS - Calendar	• Workgroup actions around READINESS will take place in month 12.
49. READINESS Actions Prior to Workgroup Meeting 8	• Prior to Meeting 8 the external evaluator collects data on readiness outcomes. • Evaluator analyzes data and produces brief report on readiness outcomes. • Data coordinator (prior to meeting 8) transfers percentages for outcomes to Tool 9.
50. READINESS - Review of Tool 9	• Please take this time to review the blank and completed versions of Tool 9.
Sustainability Readiness Question 10 (CONTINUOUS QUALITY IMPROVEMENT - CQI)	
51. Sustainability Readiness Question 10: CQI	• How can the sustainability process be continuously improved over time?
52. CQI - Calendar	• Workgroup actions around CQI will take place in month 12.
53. CQI - Workgroup Meeting 8 Agenda	• Facilitator gives presentation on CQI • Workgroup completes Tool 10 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
54. CQI - Review of Tool 10	• Please take this time to review the blank and completed versions of Tool 10.
Sustainability Readiness Question 11 (SIX-MONTH FOLLOW-UP)	
55. Sustainability Readiness Question 11: SIX-MONTH FOLLOW-UP	• Six months later, what is the level of EBPI sustainability readiness and intentions following implementation of the readiness strategy?
56. SIX-MONTH FOLLOW-UP - Calendar	• Workgroup actions around SIX-MONTH FOLLOW-UP will take place in Meeting 9 in month 18.
57. SIX-MONTH FOLLOW-UP - Actions Prior to Workgroup Meeting 9	• Prior to Meeting 9, external evaluator collects data on Readiness and Intentions to Sustain EBPI. • The data will be collected from sustainability leadership committee members. • The evaluator will provide a report and completed Tool 11 to the workgroup.
58. SIX-MONTH FOLLOW-UP - Workgroup Meeting 9 Agenda	• Workgroup reviews report and Tool 11. • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee.
59. SIX-MONTH FOLLOW-UP - Review of Tool 11	• Please take this time to review the blank and completed versions of Tool 11.
Closing	

PowerPoint Slides (Agenda Section)	Slide Contents
60. Next Steps	• Description of TA that will be provided as part of the support system. • Within one week, the TA providers will contact the workgroup facilitator and data coordinator to schedule four 30-minute TA appointments. • Workgroup members may also take advantage of 'drop-in calls' for TA that will be scheduled throughout the strategy implementation time period.
61. Questions and Answers	Questions and Answers

Section 1B: Training Guide for a Training of Multiple Workgroups

Introduction

Purpose of Training

The purpose of this training is to provide EBPI implementing organization's sustainability workgroup members with the needed information, materials, and understanding to implement the sustainability strategy to sustain EBPIs (evidence-based prevention interventions).

Training Outline

The training is designed for implementation as a workshop in one 7-hour day, including adequate breaks.

The main topics to be covered are:

- Background
- Course materials
- Introductions of presenters and participants
- What is sustainability? Why is sustainability important?
- Key terms
- Logic model
- Sustainability Readiness Questions
- Completion calendar
- Individual presentation of the 11 questions highlighting for each question:
  - Purpose
  - Calendar
  - Tasks and tools to be completed
  - Blank and completed tools
  - Agendas for workgroup meetings
- Excel tool demonstration for selected Sustainability Readiness Questions

Objectives

Workgroup members who are required to participate in the training workshop will:

- Gain familiarity with and become comfortable using all the sustainability materials.
- Demonstrate a working understanding of all terms, concepts, tasks, and tools needed to plan, implement, and monitor implementation of the sustainability process
- Demonstrate knowledge and proficiency in the step-by-step GTO^{TM} sustainability process.
- Develop a follow-up plan that includes:
  - Future meeting dates, locations and times.
  - Names and contact information for those who will help move the sustainability process forward.
  - Plans with dates, times, and methods for follow-up technical assistance.

Time Required

The training workshop is designed for implementation in one 7-hour day (9:00 AM to 4:00 PM) with morning and afternoon breaks of 15 minutes each and a one-hour working lunch.

Participants

The facilitator and the data coordinator from each sustainability workgroup are required to attend the training workshop.

Course Supplies

One set of the following materials is needed for each workshop participant:

- Sustainability Toolkit (bound copy)
- Flash drive with Excel versions of tools
- Participant packet (a specific list of materials is included later in this guide)

Training Site

The lead trainer shall arrange access to a training site that is comfortable, well lit, convenient to participants, accessible to persons with disabilities, and conducive to a positive training experience for all. The site shall be open and available for the trainer to set up a minimum of one hour before the start of the training.

The training room itself shall include adequate space for participants, large enough to allow everyone to be comfortably seated and to move around and interact with one another. As a helpful guideline, we recommend providing approximately 50–60 square feet per participant. Because of the participatory nature of the training, it's essential that tables and chairs be movable. We recommend that participants be seated at round tables, with no one's back to the trainer.

If only long tables are available, they shall be arranged in a fashion that allows everyone to see the trainer easily while seated and minimizes the likelihood that participants will be seated behind one another. Classroom seating shall be avoided.

The training room shall have controllable heating and cooling with clear access for the trainer to set and adjust the room temperature. The training room shall also have walls on which participants may post large flip chart paper sheets during the workshop session. If necessary, secure permission to use masking tape on the training room walls prior to booking a training site.

A rectangular table shall be set up at the front of the room for the trainer's materials and notes. Set up a second table accessible to participants at the beginning of the workshop and during breaks on which resources may be placed. A separate table or projector stand is needed for the overhead projector or data projector (see Equipment and Materials list below).

Equipment and Materials

The following equipment and materials need to be present in the training room prior to the start of the one-day training:

- LCD monitor/projector and projector stand. Note: If an LCD monitor is not available, an overhead projector and projector stand need to be provided.
- Large screen
- Extra projector bulb
- Extension cord

- Two flip chart stands with full easel pads of flip chart paper
- Markers, a minimum of two dozen fresh, nontoxic, water-based markers in bright, strong colors
- Small pads of Post-It® notes
- Masking tape
- Extra pencils and paper
- Lavaliere microphone. Note: This is optional depending on the size and acoustics of the training room and the number of workshop participants—to be determined in consultation with the trainer.
- All handouts and materials

Refreshments

Appropriate refreshments will be available to participants as they arrive and during breaks. If possible, the break service shall be set up within the training room in a way that does not impede participant movement during the training. Drinking water shall be available either in the break area or on the tables where participants are seated.

Lunchtime arrangements shall be made ahead of time to facilitate a working lunch session.

Registration

Set up and administer participant registration and provide nametags and/or name tents with participant names in large readable type.

Participant Packets and Handouts

Each participant shall have a complete copy of the Sustainability Toolkit, the Excel flash drive with all the tools on it, as well as other materials specified in the folder list below.

The trainer will provide handouts for each participant using a high-quality copier or commercial copy service. We recommend that single-sided copies be made on paper of varied colors to create a more interesting presentation and to assist the trainer and participants in locating specific handouts.

For each participant, copy and prepare a set of the following handouts, placing them in a pocketed folder in the following order:

On the left side of a participant folder:

- Training agenda (H-1)
- Definitions of Terms (H-2)
- Logic Model (H-3)
- Sustainability Readiness Questions (H-4)

On the right side of the participant folder:

- PowerPoint slides copied as a handout for note taking (H-5)
- TA Planning Form (H-6)

The participant folders may either be distributed as participants register or placed on tables prior to registration.

H-1 Agenda - Workgroup Member Training

9:00 – 9:15	Introduction
9:15 – 9:30	Adapted GTO Sustainability Process
9:30 – 10:15	Adapted GTO Q-1: SELECT EBPIs
10:15 – 10:30	Morning Break
10:30 – 11:00	Adapted GTO Q-2: PRE-READINESS ASSESSMENT
11:00 – 11:30	Adapted GTO Q-3: OUTCOMES
11:30 – 12:00	Adapted GTO Q-4: ACTIVITIES
12:00 – 1:00	Working Lunch – Adapted GTO Q5 & Q6: FIT & RESOURCES
1:00 – 1:30	Adapted GTO Q-7: PLAN
1:30 – 2:00	Adapted GTO Q-8: IMPLEMENTATION MONITORING
2:00 – 2:20	Adapted GTO Q-9: POST-READINESS ASSESSMENT
2:20 – 2:35	Afternoon Break
2:35 – 3:00	Adapted GTO Q-10: CONTINUOUS QUALITY IMPROVEMENT (CQI)
3:00 – 3:30	Adapted GTO Q-11: SX-MONTH FOLLOW-UP
3:30 – 4:00	Separate Breakout Sessions

Workgroup Facilitators: The facilitators will meet for 15 minutes and develop a list of questions for which they need clarification based on the training. During the subsequent 15 minutes, the lead trainer will meet with the facilitators to address their questions.

Data Coordinators: The data coordinators will meet with the lead trainer for 15 minutes to engage in hands-on practice with the Excel versions of the tools. During the subsequent 15 minutes of the session, they will continue practicing using the tools.

Workgroup Member Training Content

Table 1 provides details of what will be covered in each section of the training, including PowerPoint slide numbers. The PowerPoint slides appear in the Appendix.

Table 1. Training for all workgroup members.

PowerPoint Slides (Agenda Section)	Slide Contents
Introduction	
1. Title Slide	**Sustainability Workgroup Training** **Date** **Location**
2. Introductions	• Introduction of trainers • Introduction of workgroup
3. Training Objectives	• Prepare sustainability workgroup facilitators for directing strategy implementation • Prepare data coordinators to support implementation • Prepare other workgroup members to actively participate in strategy implementation • Provide all key information and opportunities to practice implementation
4. Agenda Review	• Review of Agenda (see Handout H-1)
5. Sustainability Strategy Materials	• Sustainability Toolkit • Excel versions of tools on flash drive • Contact list for TTA staff • Contact list for external evaluation staff
6. What is Sustainability?	• The process of ensuring an adaptive system including evidence-based infrastructure capacity and strong member advocacy for sustainable evidence-based prevention interventions (EBPIs) that can be integrated into ongoing operations to benefit diverse stakeholders.
7. Why is Sustainability Important?	• Many resources and stakeholder efforts go into designing, developing, implementing, and evaluating prevention interventions that have produced positive results. • It is important for states, territories, tribes, coalitions and other entities to implement and sustain proven prevention interventions.
8. Definitions of Terms	• See Handout H-2 for terms and their definitions in the context of the sustainability strategy.
9. Logic Model	• See Handout H-3 for the sustainability logic model that outlines sustainability effects from the sustainability strategy to impact the desired outcomes.
10. Sustainability Readiness Questions	• See Handout H-4 for the 11 Sustainability Readiness Questions outlined in the table of contents. • These questions are adapted from the Getting to Outcomes[TM] (GTO) model, which is an evidence-based planning process that has been used successfully in substance abuse prevention.
11. Completion Calendar	• The completion calendar in the sustainability toolkit shows the workgroup meetings and tasks by meeting, plus the months for each meeting.
Get Started	
12. Get Started - Purpose	• The purpose of Get Started is to complete two main activities. • The first activity is to establish a sustainability leadership committee, which will convene a workgroup of at least six EBPI implementing organization members. • The second activity is to select EBPI(s) to be sustained using the sustainability strategy.
13. Get Started - Calendar	• Meetings 1 and 2 of the workgroup are to take place in months 1 and 2.
14. Get Started - Workgroup Meetings 1 and 2 Agendas	Meeting 1 • Identify workgroup members • Finalize workgroup membership • Assign workgroup roles

PowerPoint Slides (Agenda Section)	Slide Contents
	• Agree to meeting rules and processes Meeting 2 • Review criteria for EBPIs
Sustainability Readiness Question 1: SELECT EBPI	
15. Sustainability Readiness Question 1: SELECT EBPI(s)	• What EBPI(s) meet the sustainability selection criteria?
16. SELECT EBPI(s) - Calendar	• Workgroup actions around Select EBPI(s) will take place in Meeting 2 in month 2.
17. SELECT EBPI(s) - Workgroup Meeting 2 Agenda	• Discuss criteria for EBPI(s) • Workgroup identifies potential EBPIs for sustainability using two criteria • Workgroup completes Tool 1 • Workgroup selects EBPI(s) using results from tool • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee; committee approves selection
18. SELECT EBPI(s) - Workgroup Meeting 2 Agenda	• Please take this time to review the blank and completed versions of Tool 1.
Sustainability Readiness Question 2 (PRE-READINESS ASSESSMENT)	
19. Sustainability Readiness Question 2: ASSESS	• What EBPI implementing organization infrastructure and member advocacy must be assessed to determine if the sustainability strategy is possible? (ASSESS)
20. ASSESS - Calendar	• External evaluation presents the assessment report; Workgroup actions around ASSESS will take place in Meeting 3 in month 3.
21. ASSESS - Workgroup Meeting 3 Agenda	- Data coordinator transfers percentages from brief report provided by external evaluator into Tool 2 - Facilitator leads discussion of report and Tool 2 - Workgroup reviews outcome adequacy ratings in Tool 2 - Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
22. ASSESS - Review of Tool 2	• Please take this time to review the blank and completed versions of Tool 2.
Sustainability Readiness Question 3 (OUTCOMES)	
23. Sustainability Readiness Question 3: OUTCOMES	• What are the desired outcomes associated with sustainability readiness that constitute the EBPI implementing organization's goal(s) for sustaining EBPIs?
24. OUTCOMES - Calendar	• Workgroup actions around OUTCOMES will take place in Meeting 4 in month 4.
25. OUTCOMES - Workgroup Meeting 4 Agenda	• Workgroup reviews top portion of Tool 3 that shows adequacy levels of readiness outcomes • Workgroup reviews lower portion of Tool 3 that shows outcome statements based on the adequacy levels for the outcomes • Workgroup discusses the results and presents summary to EBPI implementing organization's sustainability leadership committee
26. OUTCOMES - Review of Tool 3	• Please take this time to review the blank and completed versions of Tool 3.
Sustainability Readiness Question 4 (ACTIVITIES)	
27. Sustainability Readiness Question 4: ACTIVITIES	• What activities can achieve sustainability readiness desired outcomes?
28. ACTIVITIES - Calendar	• Workgroup actions around ACTIVITIES will take place in Meeting 5 in month 5.
29. ACTIVITIES - Workgroup Meeting 5 Agenda	• Facilitator leads discussion of activities to be implemented to achieve desired outcomes as well as delivery mechanisms for the activities

PowerPoint Slides (Agenda Section)	Slide Contents
	• Workgroup reviews Tool 4 • Workgroup completes Tool 4, including selection of delivery mechanisms • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee; committee confirms selections
30. ACTIVITIES - Review of Tool 4	• Please take this time to review the blank and completed versions of Tool 4.
Sustainability Readiness Question 5 (FIT)	
31. Sustainability Readiness Question 5: FIT	• How do the sustainability readiness strategy activities fit?
32. FIT - Calendar	• Workgroup actions around FIT will take place in Meeting 5 in month 5.
33. FIT - Workgroup Meeting 5 Agenda	• Facilitator leads discussion of FIT, including use of Tool 5 • Workgroup completes Tool 5 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
34. FIT - Review of Tool 5	• Please take this time to review the blank and completed versions of Tool 5.
Sustainability Readiness Question 6 (RESOURCES)	
35. Sustainability Readiness Question 6: RESOURCES	• What resources are needed to implement the sustainability readiness strategy activities?
36. RESOURCES - Calendar	• Workgroup actions around RESOURCES will take place in Meeting 5 in month 5.
37. RESOURCES - Workgroup Meeting 5 Agenda	• Facilitator leads discussion of RESOURCES, including the use of Tool 6 • Workgroup completes Tool 6 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
38. RESOURCES - Review of Tool 6	• Please take this time to review the blank and completed versions of Tool 6.
Sustainability Readiness Question 7 (PLAN)	
39. Sustainability Readiness Question 7: PLAN	• What is the plan for impacting sustainability readiness?
40. PLAN - Calendar	• Workgroup actions around PLAN will take place in Meeting 6 in months 6 or 7. • Finalizing the plan may require work during months 6 and 7 of the strategy. • The workgroup may find it beneficial to conduct two workgroup meetings, with each coming after regular sustainability leadership meetings, to maximize input.
41. PLAN - Workgroup Meeting 6 Agenda	• Facilitator leads discussion of development of plan • Workgroup completes Tool 7 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
42. PLAN - Review of Tool 7	• Please take this time to review the blank and completed versions of Tool 7. • NOTE: In addition to filling out Tool 7 during workgroup meeting 6, the completion of the fields that show actual completion dates for each task shall be done throughout implementation process, but before workgroup meeting 7.
Sustainability Readiness Question 8 (IMPLEMENTATION MONITORING)	
43. Sustainability Readiness Question 8: IMPLEMENTATION MONITORING	• What is the level of implementation quality?
44. IMPLEMENTATION MONITORING - Calendar	• Workgroup actions around IMPLEMENTATION MONITORING will take place in Meeting 7 in month 11.

PowerPoint Slides (Agenda Section)	Slide Contents
45. IMPLEMENTATION MONITORING - Workgroup Meeting 7 Agenda	• Facilitator leads discussion of implementation monitoring • Workgroup completes Tool 8 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
46. IMPLEMENTATION MONITORING - Review of Tool 8	• Please take this time to review the blank and completed versions of Tool 8.
Sustainability Readiness Question 9 (POST-READINESS ASSESSMENT)	
47. Sustainability Readiness Question 9: Readiness	• How well did the sustainability plan achieve sustainability readiness?
48. READINESS - Calendar	• Workgroup actions around READINESS will take place in month 12.
49. READINESS Actions Prior to Workgroup Meeting 8	• Prior to Meeting 8 (See CQI) the external evaluator collects data on readiness outcomes. • Evaluator analyzes data and produces brief report on readiness outcomes. • Data coordinator (prior to meeting 8) transfers percentages for outcomes to Tool 9.
50. READINESS - Review of Tool 9	• Please take this time to review the blank and completed versions of Tool 9.
Sustainability Readiness Question 10 (CONTINUOUS QUALITY IMPROVEMENT - CQI)	
51. Sustainability Readiness Question 10: CQI	• How can the sustainability process be continuously improved over time?
52. CQI - Calendar	• Workgroup actions around CQI will take place in month 12.
53. CQI - Workgroup Meeting 8 Agenda	• Facilitator gives presentation on CQI • Workgroup completes Tool 10 • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee
54. CQI - Review of Tool 10	• Please take this time to review the blank and completed versions of Tool 10.
Sustainability Readiness Question 11 (SIX-MONTH FOLLOW-UP)	
55. Sustainability Readiness Question 11: SIX-MONTH FOLLOW-UP	• Six months later, what is the level of EBPI sustainability readiness and intentions following implementation of the readiness strategy?
56. SIX-MONTH FOLLOW-UP - Calendar	• Workgroup actions around SIX-MONTH FOLLOW-UP will take place in Meeting 9 in month 18.
57. SIX-MONTH FOLLOW-UP - Actions Prior to Workgroup Meeting 9	• Prior to Meeting 9, external evaluator collects data on Readiness and Intentions to Sustain EBPI. • The data will be collected from sustainability leadership committee members. • The evaluator will provide a report and completed Tool 11 to the workgroup.
58. SIX-MONTH FOLLOW-UP - Workgroup Meeting 9 Agenda	• Workgroup reviews report and Tool 11. • Workgroup presents summary to EBPI implementing organization's sustainability leadership committee.
59. SIX-MONTH FOLLOW-UP - Review of Tool 11	• Please take this time to review the blank and completed versions of Tool 11.
Closing	
60. Next Steps	• Description of TA that will be provided as part of the support system. • Within one week, the TA providers will contact the workgroup facilitator and data coordinator to schedule four 30-minute TA appointments.

PowerPoint Slides (Agenda Section)	Slide Contents
	• Workgroup facilitators and data coordinators may also take advantage of 'drop-in calls' for TA that will be scheduled throughout the strategy implementation time period.
61. Questions and Answers	Questions and Answers

Table 2. Workgroup facilitator breakout session.

PowerPoint Slides (Agenda Section)	Slide Contents
First 15 Minutes of Breakout Session	
62. Title Slide	**Workgroup Facilitator Breakout Session**
63. Workgroup Facilitator Breakout Session - Purpose of Session	• The purpose of this session is to give you a chance to raise any questions you have based on today's training. • For the first 15 minutes, you will meet as a group and make a list of all questions from the training today for which you need answers or clarification. • During the second 15 minutes, the lead trainer will meet with you to discuss your questions and provide responses.
64. Workgroup Facilitator Breakout Session -First 15 Minutes	First 15 minutes • Please make a list of all questions from the training today for which you need clarification. • Write your questions on a flip chart.
Second 15 Minutes of Breakout Session	
65. Workgroup Facilitator Breakout Session - Second 15 Minutes	Second 15 minutes • Lead trainer reviews and responds to questions. • Writes responses on flip chart. • The trainers will provide all questions and responses to the entire group through a follow-up email.

Table 3. Data coordinator breakout session.

PowerPoint Slides (Agenda Section)	Slide Contents
First 15 Minutes of Breakout Session	
66. Title Slide	**Data Coordinator Breakout Session**
67. Data Coordinator Breakout Session - Purpose	• The purpose of this breakout session is to provide you with demonstration and hands-on experience using the Excel tools.
68. Data Coordinator Breakout Session – First 15 Minutes	• Go through Excel versions of Tools 1 through 6 together, reviewing the following: • How the workgroup (or external evaluator) provides information that will be input • How information from one tool is pre-populated into subsequent tools • How adequacy levels are calculated within the Excel tools • Review steps for saving the data and safeguarding the data
Second 15 Minutes of Breakout Session	
69. Data Coordinator Breakout Session -Data	• Please continue self-led practice. • Make a list of any questions for which you need clarification. • Write your questions on flip chart.

PowerPoint Slides (Agenda Section)	Slide Contents
Coordinator Practice Using Tools	• The lead trainer will provide the questions and responses to the entire group through a follow-up email.

Section 2: Technical Assistance Guide

Introduction

This section of the guide is designed to assist the technical assistance (TA) providers who will be conducting follow-up TA with the workgroups once the initial one-day training is completed. With any initiative that involves multiple meetings and multi-stage work, there is potential for the process to get derailed, interest to flag, or other responsibilities take precedence. To minimize these potential interruptions and barriers, we have designed two ways in which TA will be provided to help keep the workgroups on track through the entire sustainability strategy implementation process.

Technical Assistance Products

Within Sustainability Readiness Question 4 of the toolkit, the workgroups are asked to select one or more specific delivery mechanisms for the sustainability activities they and their organization will implement. The three delivery mechanisms are:

- Support system TA
- EBPI implementing organization's leadership guidance through discussions, and
- EBPI implementing organization task force.

For each of the sustainability activities designated in Tool 4, the tool shows the workgroup that Support System TA is available. The specific seven activities are:

- Data Resources – Availability of data and sharing of data among stakeholders
- Expertise – Expertise to plan, implement and sustain EBPIs
- Formalization – Operating structures and processes important to organization functioning
- Funding Resources – Funding from multiple sources
- Policies – Well-developed policies for EBPI implementation, monitoring, and sustainability
- EBPI Champions – Organization member proactive advocacy to implement EBPIs
- Sustainability Champions – Organization member proactive advocacy to sustain EBPIs

For each of the above seven sustainability activities, the TA providers will have available for the workgroup members a brief guide for the activity. The guide will include:

- A description of the activity
- A set of findings that shows the relationship of the activity to sustainability, and
- Brief examples of how the activity may be used to increase sustainability readiness.

Technical Assistance Contacts

We have designed two primary methods through which TA will be provided to workgroups.

Scheduled TA Contacts

The first method will be through four scheduled TA calls or face-to-face meetings through which the TA providers will review with the facilitator and data coordinator the following Sustainability Readiness Questions:

- Scheduled TA Contact #1: Questions 1 (EBPI), 2 (ASSESS), and 3 (OUTCOMES)
- Scheduled TA Contact #2: Questions 4 (ACTIVITIES), 5 (FIT), and 6 (RESOURCES)

- Scheduled TA Contact #3: Question 7 (PLAN)
- Scheduled TA Contact #4: Question 8 (IMPLEMENTATION MONITORING), 9 (READINESS), and 10 (CQI)

Within one week after the facilitator and data coordinator training, the TA providers will contact the workgroup facilitator and data coordinator to schedule four, 30-minute TA appointments. It is extremely important to make a commitment to scheduling the TA calls or meetings and keeping to the schedule. While some changes may be unavoidable, keeping to a schedule of your TA provision to the workgroups will help ensure the success of the sustainability workgroups. TA meetings shall begin and end within the scheduled times.

The format of the scheduled TA calls or face-to-face meetings is also important. The TA providers will take five minutes at the beginning of each appointment to check in with the group about their continued understanding of why the sustainability process is being implemented. Next the TA may discuss the specifics about the Sustainability Readiness Questions that are the topic of the current call or meeting. For example, during scheduled TA Contact #1, the TA provider will review the purpose of Questions 1 through 3 (EBPI, ASSESS and OUTCOMES). This will set the stage for keeping the participants focused, facilitating questions being asked, and working through any issues that come up. At the end of each TA meeting, about five minutes shall be set aside to review what was discussed and what is expected in the next scheduled contact.

Just as it is important for the workgroup facilitators and data coordinators to be accountable (by committing to a schedule for TA contacts), it is also important for the TA team to be accountable. To ensure continuity and relationship building, a single person will be identified as having lead responsibility for each workgroup's TA. The TA team also commits to maintaining centralized storage for TA reports and a feedback system within the TA team and workgroup that incorporates key information provided during TA contacts and helps facilitate its own CQI (continuous quality improvement) process. In addition, the TA team needs to commit to sending an advance email before each TA contact with a reminder and a short agenda for the TA contact.

Drop-In TA Calls

The second method of providing TA to the workgroups will be through a series of TA drop-in calls. As used here, a drop-in call is defined as a scheduled conference call during which a TA provider requests beforehand that workgroup facilitators or data coordinators who need assistance call into the conference line to ask questions and receive TA.

The TA providers will schedule a series of drop-in calls during which workgroup facilitators and data coordinators may call in to discuss any questions or issues that arise during sustainability strategy implementation. The drop-in calls will by necessity cover questions about multiple Sustainability Readiness Questions.

Within one week after the facilitator and data coordinator training, the TA providers will send the schedule for the drop-in calls to the workgroup facilitators and data coordinators. The schedule will cover the entire 12-month sustainability strategy implementation time period. For a given week in which drop-in calls will be conducted the schedule might look something like this:

Drop-In TA Call Schedule for Week 1

Monday	**10:00-10:30 AM**
Wednesday	**1:00-1:30 PM**
Thursday	**2:00-2:30 PM**

Members of the PIRE team have been part of such TA drop-in calls for multiple federally funded, community-based prevention initiatives, including the current Ohio Strategic Prevention Framework Partnerships for Success (SPF-PFS) project. Subrecipients that have participated in the drop-in calls have noted that the TA provided during the calls has been very helpful in keeping them on track.

Documentation of TA Contacts

As noted above, the TA providers shall be committed to careful documentation of what occurs in the TA contacts. This documentation will provide an important source of information to improve future TA and to provide the workgroups with additional information that may be helpful as they move through implementation of the sustainability strategy.

Scheduled TA Contacts

Following each scheduled TA appointment, the TA provider(s) will document in a report who participated, what questions or issues were raised, and the content of the TA that was provided. Following each round of TA contacts being completed with all workgroups (e.g., following the full round of TA contact #1 implementation), the TA team will meet to review the report and discuss what was learned to shape the remaining TA provision. The portion of the report that applies to each of the workgroups will be provided to that workgroup. The following basic information will be included in this report:

- Names of TA provider(s)
- Mode of delivery (phone or face-to-face meeting)
- Sustainability Readiness Questions associated with the TA contact
- Names and titles of workgroup participants in the TA
- Summary of issues or questions and TA provided to address the issues/questions
- Agreed upon next steps

Drop-In TA Calls

One TA provider will take notes during each drop-in call. The notes will summarize what the questions or issues were and what TA was provided to address the questions or issues. The TA team will meet monthly to review the notes from the TA calls for that month, and after this review, the notes will be compiled into a report.

The notes for each month will be distributed to the workgroups to help ensure that important information is shared. The same basic information that was included in the reports on scheduled TA contacts shall be included in the drop-in TA call reports.

Appendix: Sustainability Workgroup Training PowerPoint Slides

Sustainability Readiness Strategy Materials

- Sustainability Readiness Toolkit
- Excel versions of tools on flash drive
- Contact list for TTA staff
- Contact list for external evaluation staff

5

What is Sustainability?

- Sustainability is the process of ensuring an adaptive prevention system consisting of adequate infrastructure capacity and strong member advocacy for evidence-based preventive interventions (EBPIs) that can be integrated into ongoing operations and continue to benefit stakeholders.

6

Why is Sustainability Important?

- Many resources and stakeholder efforts go into designing, developing, implementing & evaluating prevention interventions that have produced positive results.
- It is important for organizations that implement substance abuse prevention interventions to implement and sustain evidence-based prevention interventions (EBPIs).

7

Definitions of Terms

- See Handout H-2 for terms and their definitions in the context of the sustainability readiness strategy.

8

Logic Model

- See Handout H-3 for the sustainability readiness logic model.

Sustainability Questions

- See Handout H-4 for the 11 sustainability readiness questions.
- These questions are adapted from the Getting to Outcomes™ (GTO) model, which has been used successfully in substance abuse prevention.

Completion Calendar

Sustainability Workgroup Meeting	Workgroup Tasks	Month
1	-Establish workgroup	1
2	-Complete the Get Started tasks -Select EBPI to be sustained using Tool 1 (Select Sustainable EBPI Tool)	2
3	-Review Tool 2 (Pre- Readiness Assessment Results)	3
4	-Complete Tool 3 (Coalition Infrastructure Capacity and Member Advocacy Outcomes)	4
5	-Complete Tool 4 (Review of Sustainability Readiness Activities) -Complete Tool 5 (Fit of Sustainability Readiness Activities) -Complete Tool 6 (Resources for Sustainability Readiness Activities)	5
6	-Complete Tool 7 (Sustainability Readiness Plan)	6-7
7	-Complete Tool 8 (Sustainability Readiness Implementation Monitoring Tool)	11
8	-Review Tool 9 (Post- Readiness Assessment Results) -Complete Tool 10 (COI Summary)	12
	-Review Tool 11 (Readiness and EBPI Sustainability Intentions)	13

Get Started - Purpose

- The purpose of Get Started is to complete two main activities.
- The first activity is to establish a sustainability leadership committee that will convene a workgroup of at least 5 to 6 coalition members.
- The second activity is to select an EBPI to be sustained using the sustainability strategy.

Get Started - Calendar

- Meetings 1 and 2 of workgroup are to take place in months 1 and 2.

13

Get Started – Workgroup Meetings 1 and 2 Agendas

Meeting 1
- Identify workgroup members
- Finalize workgroup membership
- Assign workgroup roles
- Agree to meeting rules and processes
- Workgroup presents summary to coalition

Meeting 2
- Review criteria for EBPIs

14

Sustainability Readiness Question 1: Select EBPI

- What EBPI(s) meet the sustainability selection criteria?

15

Select EBPI - Calendar

- Actions around Select EBPI will take place in Meeting 2 in month 2.

16

27

Select EBPI – Workgroup Meeting 2 Agenda

- Discuss criteria for EBPIs
- Workgroup identifies potential EBPIs for sustainability using two criteria
- Workgroup completes Tool 1
- Workgroup selects EBPI using results from tool
- Workgroup presents summary to coalition; coalition approves selection

17

Select EBPI – Review of Tool 1

- Please take this time to review the blank and completed versions of Tool 1.

18

Sustainability Readiness Question 2: PRE-READINESS ASSESSMENT

- What EBPI implementing organization (1) infrastructure and (2) membership advocacy must be assessed to determine if the sustainability strategy is possible? (ASSESS)

19

PRE-READINESS ASSESSMENT - Calendar

- Actions around ASSESS will take place in Meeting 3 in month 3.

20

PRE-READINESS ASSESSMENT –
Workgroup Meeting 3 Agenda

- Data coordinator transfers percentages from brief report provided by external evaluator into Tool 2
- Facilitator leads discussion of report and Tool 2
- Workgroup reviews outcome adequacy ratings in Tool 2
- Workgroup presents summary to sustainability leadership committee

21

PRE-READINESS ASSESSMENT –
Review of Tool 2

- Please take this time to review the blank and completed versions of Tool 2.

22

Sustainability Readiness Question 3:
OUTCOMES

- What are the desired outcomes associated with sustainability readiness that constitute the EBPI implementing organization's goal(s) for sustaining EBPIs?

23

OUTCOMES - Calendar

- Actions around OUTCOMES will take place in Meeting 4 in month 4.

24

OUTCOMES – Workgroup Meeting 4 Agenda

- Workgroup reviews top portion of Tool 3 that shows adequacy levels of readiness outcomes
- Workgroup reviews lower portion of Tool 3 that shows outcome statements based on the adequacy levels for the outcomes
- Workgroup discusses the results and presents summary to sustainability leadership committee

25

OUTCOMES – Review of Tool 3

- Please take this time to review the blank and completed versions of Tool 3.

26

Sustainability Readiness Question 4: ACTIVITIES

- What sustainability activities can achieve sustainability readiness desired outcomes?

27

ACTIVITIES - Calendar

- Actions around ACTIVITIES will take place in Meeting 5 in month 5.

28

ACTIVITIES – Workgroup Meeting 5 Agenda

- Facilitator leads discussion of activities to be implemented to achieve desired outcomes as well as delivery mechanisms for the activities
- Workgroup reviews Tool 4
- Workgroup reviews with committee the activities being considered
- Workgroup completes Tool 4, including selection of delivery mechanisms
- Workgroup presents summary to committee and committee confirms selections

29

ACTIVITIES – Review of Tool 4

- Please take this time to review the blank and completed versions of Tool 4.

30

Sustainability Readiness Question 5: FIT

- How do the sustainability readiness strategy activities fit?

31

FIT - Calendar

- Actions around FIT will take place in Meeting 5 in month 5.

32

FIT – Workgroup Meeting 5 Agenda

- Facilitator leads discussion of FIT, including the use of Tool 5
- Workgroup completes Tool 5
- Workgroup presents summary to committee

33

FIT – Review of Tool 5

- Please take this time to review the blank and completed versions of Tool 5.

34

Sustainability Readiness Question 6: RESOURCES

- What resources are needed to implement the sustainability readiness activities?

35

RESOURCES - Calendar

- Actions around RESOURCES will take place in Meeting 5 in month 5.

36

RESOURCES – Workgroup Meeting 5 Agenda

- Facilitator leads discussion of RESOURCES, including the use of Tool 6
- Workgroup completes Tool 6
- Workgroup presents summary to committee

37

RESOURCES – Review of Tool 6

- Please take this time to review the blank and completed versions of Tool 6.

38

Sustainability Readiness Question 7: PLAN

- What is the plan for impacting sustainability readiness?

39

PLAN - Calendar

- Actions around PLAN will take place in Meeting 6 in months 6 or 7.
- Finalizing the plan may require work during months 6 and 7 of the strategy.
- The workgroup may find it beneficial to conduct two workgroup meetings, with each coming after regular committee meetings, to maximize input.

40

PLAN – Workgroup Meeting 6 Agenda

- Facilitator leads discussion of development of plan
- Workgroup completes Tool 7
- Workgroup presents summary to committee

41

PLAN – Review of Tool 7

- Please take this time to review the blank and completed versions of Tool 7.
- NOTE: In addition to filling out Tool 7 during workgroup meeting 6, the completion of the fields that show actual completion dates for each task should be done throughout implementation process, but before workgroup meeting 7.

42

Sustainability Readiness Question 8: IMPLEMENTATION MONITORING

- What is the level of implementation quality?

43

IMPLEMENTATION MONITORING - Calendar

- Actions around IMPLEMENTATION MONITORING will take place in Meeting 7 in month 11.

44

IMPLEMENTATION MONITORING –
Workgroup Meeting 7 Agenda

- Facilitator leads discussion of implementation monitoring
- Workgroup completes Tool 8
- Workgroup presents summary to committee

45

IMPLEMENTATION MONITORING –
Review of Tool 8

- Please take this time to review the blank and completed versions of Tool 8.

46

Sustainability Readiness Question 9:
POST-READINESS ASSESSMENT

- How well did the sustainability plan achieve sustainability readiness?

47

POST-READINESS ASSESSMENT -
Calendar

- Actions around READINESS will take place in month 12.

48

POST-READINESS ASSESSMENT
Actions Prior to Workgroup Meeting 8

- Prior to Meeting 8 (See CQI) the external evaluation team collects data on readiness outcomes.
- Evaluation team analyzes data and produces brief report on readiness outcomes.
- Data coordinator (prior to meeting 8) transfers percentages for outcomes to Tool 9.

49

POST-READINESS ASSESSMENT –
Review of Tool 9

- Please take this time to review the blank and completed versions of Tool 9.

50

Sustainability Readiness Question 10: CQI

- How can the sustainability process be continuously improved over time?

51

CQI - Calendar

- Actions around CQI will take place in month 12.

52

CQI – Workgroup Meeting 8 Agenda

- Facilitator gives presentation on CQI
- Workgroup completes Tool 10
- Workgroup presents summary to committee

53

CQI – Review of Tool 10

- Please take this time to review the blank and completed versions of Tool 10.

54

Sustainability Readiness Question 11: SIX-MONTH FOLLOW-UP

- Six months later, what is the level of EBPI sustainability readiness and intentions following implementation of the readiness strategy?

55

SIX-MONTH FOLLOW-UP - Calendar

- Actions around SIX-MONTH FOLLOW-UP will take place in Meeting 9 in month 18.

56

SIX-MONTH FOLLOW-UP – Actions Prior to Workgroup Meeting 9

- Prior to Meeting 9, external evaluation team collects data on readiness and EBPI sustainability intentions.
- The data will be collected from sustainability leadership committee members.
- The evaluation team will provide a report and completed Tool 11 to the workgroup.

57

FOLLOW-UP – Workgroup Meeting 9 Agenda

- Workgroup reviews report and Tool 11
- Workgroup presents summary to committee

58

FOLLOW-UP – Review of Tool 11

- Please take this time to review the blank and completed versions of Tool 11.

59

NEXT STEPS

- Description of TA that will be provided as part of the support system.
- Within one week, the TA providers will contact the workgroup facilitator and data coordinator to schedule four 30-minute TA appointments.
- Workgroup facilitators and data coordinators may also take advantage of 'drop-in calls' for TA that will be scheduled throughout the strategy implementation time period.

60

Questions and Answers

61

Pacific Institute
FOR RESEARCH AND EVALUATION

Translating Science *into* Practice

PIRE Sustainability Strategy

Sustainability Facilitator Breakout Session

62

Workgroup Facilitator Breakout Session

- The purpose of this session is to give you a chance to raise any questions you have based on today's training.
- For the first 15 minutes, you will meet as a group and make a list of all questions from the training today for which you need answers or clarification.
- During the second 15 minutes, the lead trainer will meet with you to discuss your questions and provide responses.

63

Workgroup Facilitator Breakout Session – First 15 Minutes

- Please make a list of all questions from the training today for which you need clarification.
- Write your questions on a flip chart.

64

Workgroup Facilitator Breakout Session – Second 15 Minutes

- Lead trainer reviews and responds to questions.
- Writes responses on flip chart.
- The trainers will provide all questions and responses to the entire group through a follow-up email.

65

PIRE Sustainability Strategy

Data Coordinator Breakout Session

66

Data Coordinator Breakout Session - Purpose

- The purpose of this breakout session is to provide you with demonstration and hands-on experience using the Excel tools.

67

Data Coordinator Breakout Session – First 15 Minutes

- Go through Excel versions of Tools 1 through 6 together, reviewing the following:
  - How the workgroup (or external evaluation team) provides information that will be input
  - How information from one tool is pre-populated into subsequent tools
  - How adequacy levels are calculated within the Excel tools
  - Review steps for saving the data and safeguarding the data

68

Data Coordinator Breakout Session – Second 15 Minutes

- Please continue self-led practice.
- Make a list of any questions for which you need clarification.
- Write your questions on flip chart.
- The lead trainer will provide the questions and responses to the entire group through a follow-up email.

69

40