

TAKING STOCK AND PLANNING FOR SUCCESS: SUSTAINABILITY “HEALTH CHECK”

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Lori Wingate, EvaluATE

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TODAY'S PRESENTERS



Nancy L. Maron

Founder, BlueSky to BluePrint, LLC



Rachael Bower

University of Wisconsin-Madison

PI, ATE Central

TODAY'S GUEST SPEAKER



Lori Wingate

PI, EvaluATE

Director of Research, The Evaluation Center
Western Michigan University

POLL QUESTION #1

I would describe myself as:

- A. Affiliated with an ATE grant
- B. Affiliated with a different NSF granting program
- C. Not currently funded, but writing an ATE grant
- D. Other

ATE: Advanced Technological Education

- NSF Funding – focus on technician education; professional development; community colleges
- Approximately 306 projects & centers currently funded
- Not just a funding program; a real community
- Variety of cross-cutting support for community members

Primary Purpose: Amplify the Impact of ATE

- Information Hub and Portal
- Resource Collection
- Services and Tools
- Outreach and Dissemination

Sustainability Support

- ATE Central: community driven
- *ATE Community Needs Survey* (annual)
- Significant need: sustainability support
- Workshops + webinars

I T H A K A

ITHAKA is a not-for-profit organization that helps the academic community use digital technologies to preserve the scholarly record and to advance research and teaching in sustainable ways.



JSTOR is a not-for-profit digital library of academic journals, books, and primary sources.



Ithaka S+R is a not-for-profit research and consulting service that helps academic, cultural, and publishing communities thrive in the digital environment.



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Portico is a not-for-profit preservation service for digital publications, including electronic journals, books, and historical collections.



- Strategy, consulting, research and training
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SUSTAINABILITY HEALTH CHECK:

SUSTAINABILITY STRATEGIES FOR LEADERS OF ATE PROJECTS AND CENTERS

**WEBINAR SERIES
FEBRUARY – APRIL 2018**

This season, our webinar series on Sustainability focuses on topics useful to Centers and Projects at all stages of growth. It is never too soon to be thinking about life “post-grant,” whether you are planning for independence or preparing for a time when grants may not be forthcoming.

SUSTAINABILITY HEALTH CHECK

SUSTAINABILITY STRATEGIES FOR ATE PROJECTS AND CENTERS



TODAY

FEBRUARY 6: Taking Stock and Planning for Success
GUEST SPEAKER: Lori Wingate

MARCH 6: Re-visiting your sustainability goals in a post-grant world
GUEST SPEAKER: Ann Beheler

APRIL 10: Succession Planning: How to build a plan so that your work continues without you
GUEST SPEAKER: Kathy Alfano

GOALS OF TODAY'S WEBINAR

- Introduce broad definition of “sustainability”
- Share the “health check” method, a way to assess your progress through the lens of sustainability
- Offer the perspective of an experienced practitioner on best practices for evaluating progress and sustainability

POLL QUESTION #2

How often does your project or center gather data on your key metrics?

- A. We do this every week, as a matter of course.
- B. About once a month.
- C. About once each year.
- D. Only when we need to file a report with our funder.
- E. Other

SUSTAINABILITY (A LITTLE REFRESHER)

SUSTAINABILITY IS . . .

the ability to generate or gain access to the resources—financial or otherwise—needed to protect and increase the value of the content or service for those who use it.

A **sustainability plan** is an evidence-based strategy for identifying and securing these ongoing sources of support for your project or center, over time.

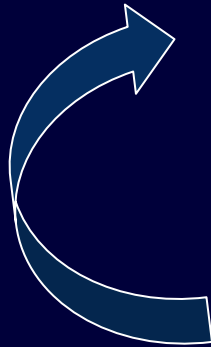


First, there is...



A reliable, recurring cycle of investment and value

EXTERNAL FACTORS

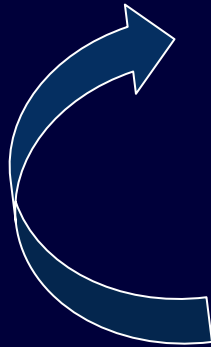


INTERNAL FACTORS



What happens when something changes?

EXTERNAL FACTORS



INTERNAL FACTORS



What happens when something changes?

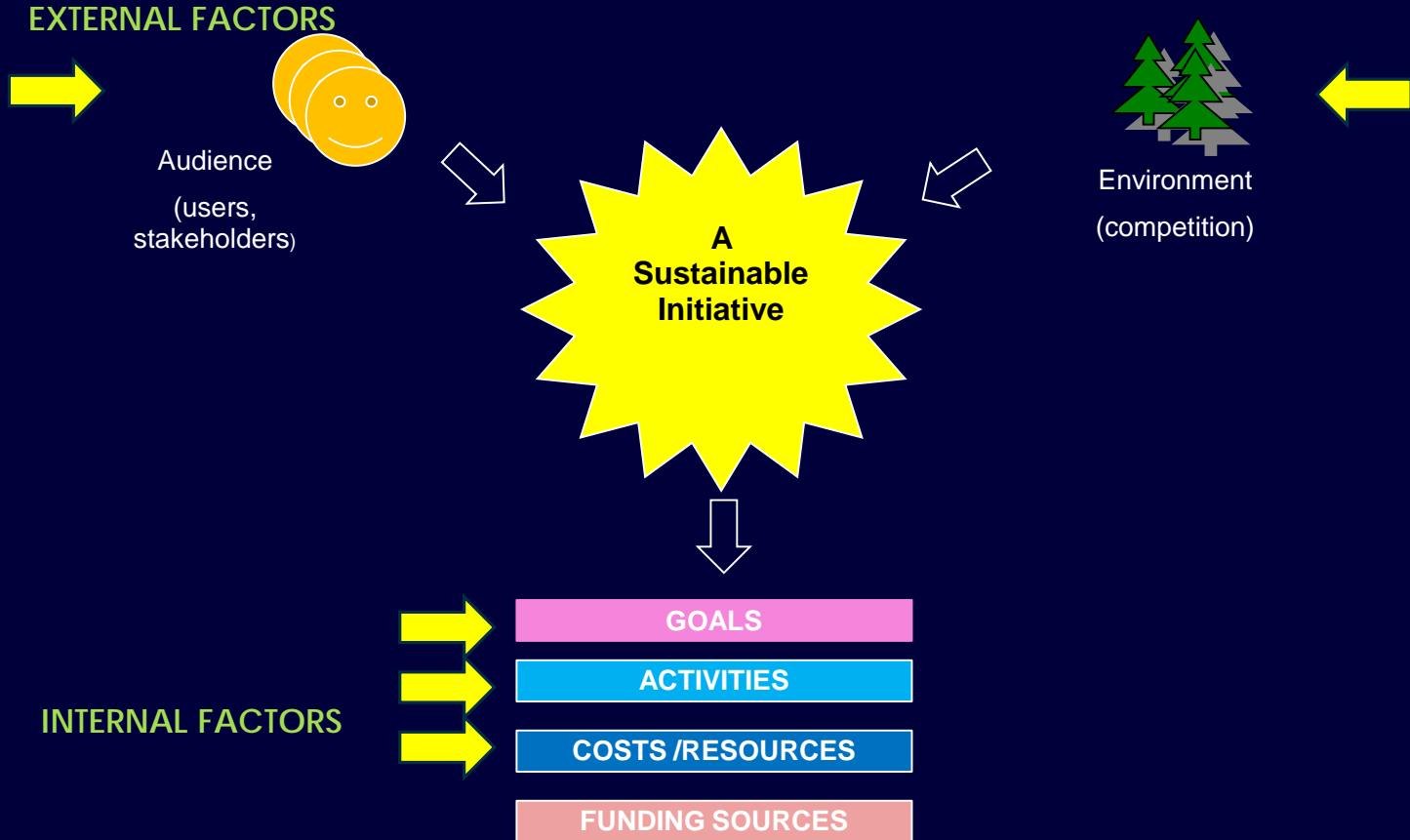
EXTERNAL FACTORS



INTERNAL FACTORS

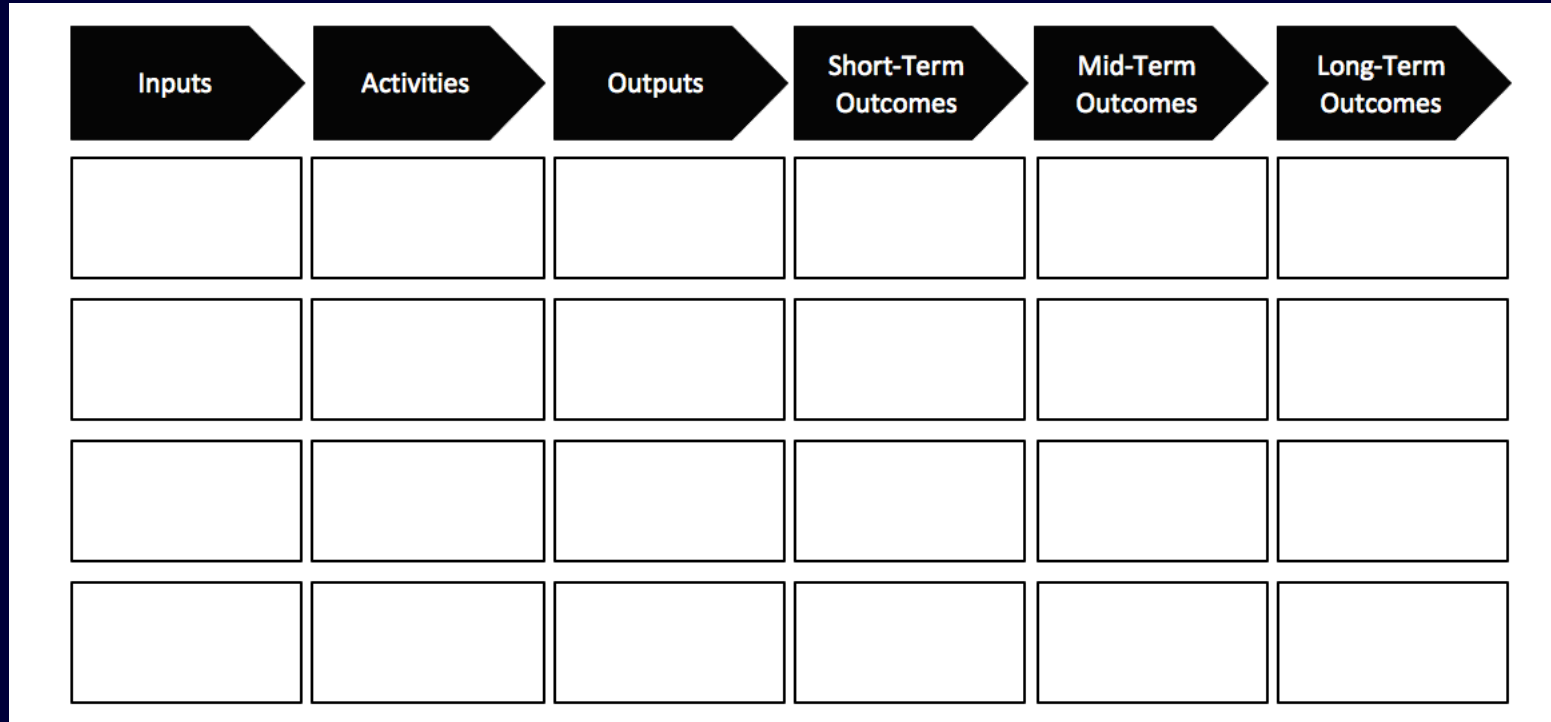


Recalibrate!



HOW EVALUATION IS KEY TO SUSTAINABILITY

LOGIC MODEL TEMPLATE



Why do it?

Staying on track...

Spotting problems on the horizon

Making decisions about future investments

Making decisions about prioritizing your resources

HEALTH CHECK!

Environment

What does the landscape look like today...

Today...

Funding?

Competition?

Political forces?

Forces at my institution?

In the next 3 years...

How is this likely to develop?

Are these trends likely to support my work (or not)?

CASE STUDY: VESTA

(Viticulture and Enology Science and Technology Alliance)

- ▶ *VESTA* establishes programs of study in viticulture, enology, and wine business entrepreneurship through collaborations with educational institutions, government and industry. This unique partnership of universities and community colleges across the nation provides students access to online coursework, thereby enabling learning to occur anytime, anywhere.



Michelle Norgren, Principal Investigator



Audience

What does my “audience” look like today?

Today...

Number of people engaging?

Type of people?


The ways in which they engage? (Are they doing the things we want or expect them to do?)


In the next 3 years...

How is this likely to develop?

Are these trends likely to support my work (or not)?

CASE STUDY: EBIRD





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Birding in the 21st Century.


News and Features

[Global Big Day—one week away!](#)
6 May 2016

How many birds can be seen in a single day? The US big day record is 294. Last July in Peru, Sean Williams did a bird race on foot, traveling 18.15 km and finding 345 species! In October 2015, Dušan Brinkhuizen, Rudy Gelis, Mitch Lysinger, and Tuomas Seimola recorded 431 species in Ecuador, a new world record. **On May 14th, you can be a part of the biggest day of birding the world has ever known: [Global Big Day](#).** All you have to do is submit the birds you see on May 14th to eBird, and you'll be a part of the global team! Wherever you are, your sightings can make a difference.




Help Support eBird



eBird Rarities

Region: world



Your Activities

How well is our work delivering on our mission and the goals we have set?

Today...

Are we seeing the uptake / enrollment / job offers / curriculum development / etc.. we hoped for?

In the next 3 years...

What conditions are likely to change?

Are these activities still aligned with our goals?

Your Expenses

What does my cost base look like today?

Today...

Are we able to manage the budget you have established for this work?

Do we have assurances from 'in-kind' partners that govern their contributions?

In the next 3 years...

Is our cost base likely to increase or decrease?

How are our in-kind and volunteer contributions likely to be affected?

Your Funding

What does my funding situation look like today?

Today...

Do we have assurance that funds are forthcoming?

Do we have enough to accomplish the goals you have set?

Do we rely on one or multiple sources?

Can we project out 3 years?

In the next 3 years...

How is this likely to develop?

Are these trends likely to support our work (or not)?

Your Leadership

What does my leadership look like today?

Today...

Do we have a stable leadership team in place?
Do we have staff with the skills needed to reach your goals?

In the next 3 years...

Is current leadership likely to still be in place?
Is our recruiting pipeline strong? Will new hires will be easy to identify?



Lori Wingate

PI, EvaluATE

EvaluATE

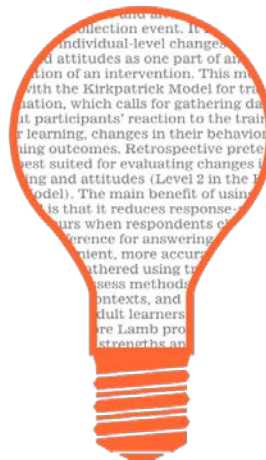
Advancing excellence through evaluation



Webinars



Resource Library



Blog



ATE Survey Data

www.evalu-ate.org

Q+A with Lori Wingate

POLL QUESTION #3

Completing a Health Check would help us:

- A. Collect data for decision making in regards to sustainability planning
- B. Consider how to integrate sustainability planning into our existing evaluation work
- C. Discover other areas of opportunity, new audiences, or potential partners
- D. All of the above

YOUR NEXT STEPS

TAKING ACTION

- What questions will you ask?
- Where will you get the information?
- How soon will you start?

WEBINAR SERIES 2018

Coming soon...

MARCH 6: Re-visiting your sustainability goals in a post-grant world

GUEST SPEAKER: Ann Beheler

APRIL 10: Succession Planning:
How to build a plan so that your work continues without you

GUEST SPEAKER: Kathy Alfano

Please visit

<https://atecentral.net/sustainability>

to sign up for the spring webinars!

PLEASE TAKE A MOMENT TO
COMPLETE OUR SURVEY...

THANK YOU

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