



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 <u>Funding and Sustainability</u> resources on the SOAR website and should be discussed with your <u>SOAR TA Center Liaison</u> 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.

1. Action Plan: Financial stability needs to be <i>planne</i> should have a concrete funding action plan with go	d for. SOAR programs (small/large, new/seasoned) oals, objectives, responsible parties and deadlines.			
Does your SOAR program currently have a funding and sustainability timeline? (This could be a standalone document or a part of a broader strategic/action plan) Yes No				
2. 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):				
Planning for multiple years Strategies for multiple funding sources Measurable action steps Input from all necessary stakeholders 3. Diversification: A financially healthy program is or Programs should be positioned where SOAR activitions 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)				
Federal (e.g. CABHI, PATH)MedicaidState/LocalFoundations	Corporate (e.g. pharmaceutical company) Specialized (e.g. local plans to end homelessness) Fundraising activities (e.g. silent auctions, golf tournaments)			
4. 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 service	Do you have an updated budget specific to the services you provide? Yes No			

J.	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).
В	ased 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.)
И	ho 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.
И	/ho 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.
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Tool #2: SOAR Funding Plan Template

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

Increase the visibility of the state's SOAR program through partne	e Visibility of SOAR rships, social media/social marketi	ing, and sharing SOAR outcome
with individuals, government, and the community.	, , , , , , , , , , , , , , , , , , , ,	
Measurable Objective	2016	2017
reate a social media presence for state SOAR activities	1 - new platform	1 - new platform
reate/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
riority 1:		
Investigate the most useful social media platform to achieve	Holley Davis	August-September 2016
desired results		
 Look into best practice uses of social media for similar 	Holley Davis and SOAR Steering	
human service programs - choose 2 products	Committee	
 Review final choices with Steering Committee, 		
soliciting input		
Make final determination about the two platforms	Holley Davis and Brian Brown	September-October 2016
Create a simple and easy to understand social media policy.	Holley Davis and SOAR Steering	November 2016
Identify a schedule for posting material (one post per day)	Committee	
 Tailor the guidance from sample social media policies (SOAR TA Center and other sources) 	Holloy Davis	November 2016 Ongoing
	Holley Davis	November 2016-Ongoing
 Draft social media policy that will be reviewed, edited and approved by the steering committee 		
Start posting material using the posting frequency schedule	Holley Davis and Jane Smith	As scheduled
Evaluate outcomes monthly	Troney Bavis and same Simen	7.5 Seriedated
 Collect and report on the analytics to the SOAR 	Brian Brown	Monthly
Steering Committee		,
 Based on the outcome of the analytics, alter social 		
media plan and policy accordingly		
riority 2:		
Speak w/ SOAR TA Center Liaison about sample materials	Holley Davis	August-September 2016
 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 	Holley Davis and SOAR Steering	October 2016
Distribute materials at local events and through social media	Committee	
Update materials on an annual basis based on new OAT	All Co. CC. LCC	0
outcomes and any programmatic changes	All Staff and Steering Committee	October 2016 - Annually
riority 3: Choose 3 "champions" who are likely to support SOAR efforts	SOAR STL	August 2016
	SOAR STL and Steering	August 2016
 Make three recommendations for each category, 1) policy maker 2) human service providers and 3) a 	Committee	
person directly connected with a funding source		
 Identify best way to engage and recognize the 	SOAR STL and Steering	August 2016
individual for their contributions (e.g. join the Steering	Committee	
Committee, give them an award, recognition on		
website)		
 Implement plans based on the discussions above 	TBD	August 2016
	1	1





Goal 2: Create Sustainable and Diverse Funding Base for SOAR Activities						
Work to create and implement a multi-source funding environment to sustain and grow SOAR activities.						
	2016	2017				
Measurable Objective Make 'funding friendly' infrastructure changes	1 - new change	2 - new changes				
Access funding for additional SOAR case workers	5 new FTEs	5 new FTEs				
Implement plan to access 'long term' funding for SOAR activities	1 - item	1 - item				
Action Steps	Lead Person	Timeframe				
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Priority 1: Create Statewide SOAR Funding and Sustainability Sub-group Add members that are important to expanding SOAR's statewide funding base. Individuals should come from a broad cross section (e.g. foundation officials, mental health and housing advocates)	Jane Smith and Brian Brown	August-September 2016				
 Membership will include those with the experience and position necessary to support expanding the financial base of SOAR activities 	SOAR STL and Steering Committee	August-September 2016				
Priority 2: Host data-informed community focus group to improve knowledge about underserved groups in need of SOAR services Using a broad coalition of stakeholders (e.g. faith based community leaders, criminal justice officials, hospitals, libraries, youth serving agencies) - identify populations not being served and the respective funding streams tasked with serving these populations. Create a set of recommendations based on this environmental scan Under the direction and oversight from the Funding and Sustainability Sub-group - develop necessary partnerships and develop plans to seek and access funding related to serving these populations Identify process for serving these populations, becoming familiar with funding sources that could potentially support plans to expand SOAR Prepare applications	James Franklin and Jane Smith Jane Smith	August-September 2016 August-September 2016 (Additional timeframe details TBD)				
Priority 3: With help and support from the SOAR TA Center, work with the State SAMHSA Mental Health Block grant lead to have SOAR included in the next application cycle Speak with members of the Block Grant Planning group to ensure that they are knowledgeable about SOAR Provide members of the MHBG Planning group with materials and SOAR outcomes Provide any necessary administrative support to have SOAR included in the next MHBG grant cycle	June Davis	TBD (Based on cycle)				