



# Financial Sustainability Planning

**TQP Program Meeting – March 23, 2022**

EED TA Center Facilitators:

Dr. Sara Kraemer

Amy Lamitie



# Reflection Question

Type your  
response in the  
chat box.

On a scale of 1 to 10, how much  
financial sustainability planning  
have you engaged in so far?

(1 = none, 10 = finished)

# Preparing for Engagement



**Webcams**  
on!



**Unmute**  
your line to  
speak.



Use the **chat**  
**box** for  
questions  
and  
comments.



Use chat  
box for  
**technical**  
**issues.**

# Session Overview and Objectives






01

Learn from TQP grantees engaging in financial sustainability planning

02

Consider how principles of financial sustainability planning might apply to your own TQP grant

# Invitation

-  Be fully prepared and present.
-  Take space and make space.
-  Support authentic conversations and dialogue.
-  Keep the conversation here but share the learning.
-  Acknowledge the empty chair.





# EED TA Center Facilitators



Sara Kraemer  
Technical Assistance  
Lead

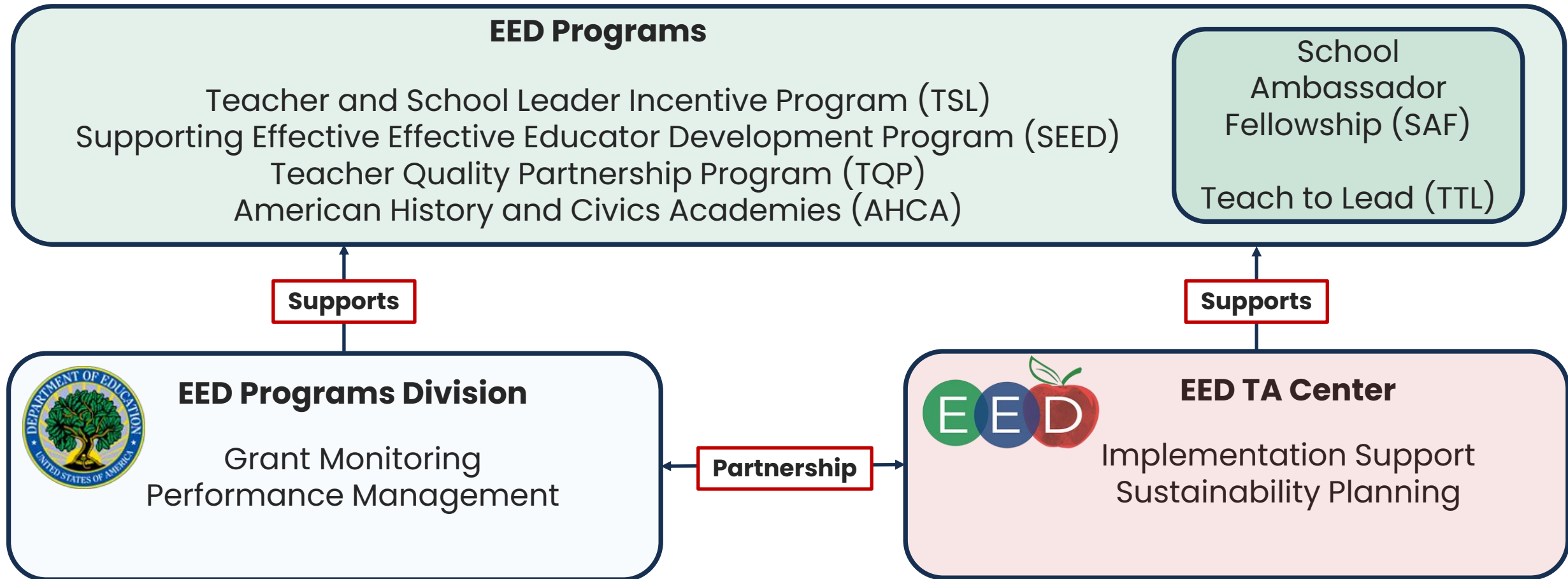


Amy Lamitie  
Technical Assistance  
Expert



Lynette Cameron  
Project Manager

# EED Programs Division and EED Technical Assistance (TA) Center

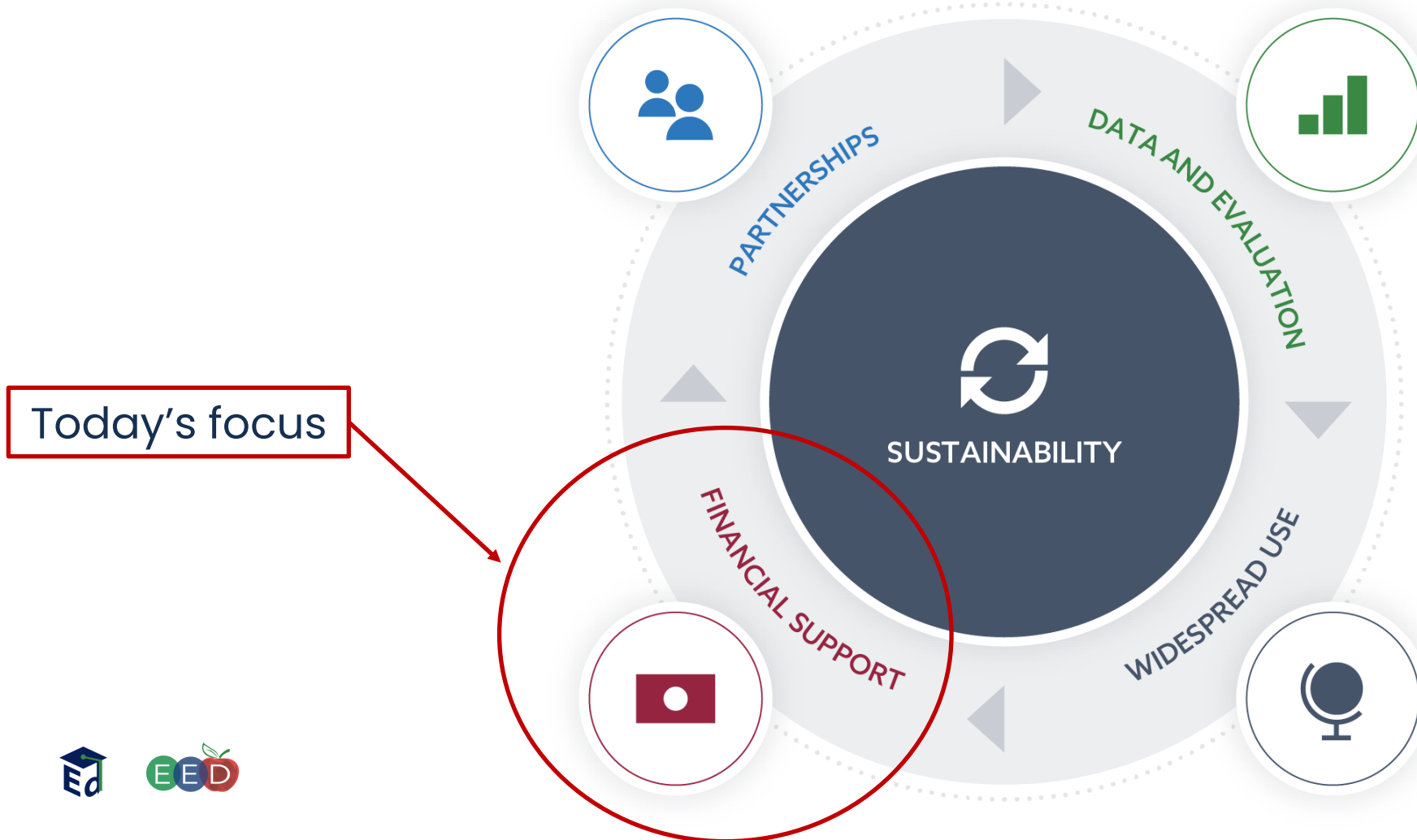


A large, light blue, stylized apple logo is centered in the background. It has a simple, rounded shape with a short stem and two leaves at the top. The text "Comprehensive Sustainability Planning" is written across the middle of the apple in white.

# Comprehensive Sustainability Planning



# Sustainability Planning Framework



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# Financial Sustainability Consultancy



# Dr. Kamal Hamdan



The Center for Innovation in STEM  
Education (CISE)  
California State University,  
Dominguez Hills  
TQP 2009, 2014, 2019  
SEED 2020

# Sustainability



- Sustaining a program is not simply decreasing dependence on one source of funding and shifting financial support for program implementation to new funding sources. The process of sustaining a program is a much more intricate and dynamic process<sup>1</sup>.
- Your data must support your sustainability plan to demonstrate program effectiveness; tell your story; diversify your funding sources; attract new partners to form new partnerships and increase investments.
- Your data will help you define which of your practices, activities, key positions should be sustained.
- Your data will tell you and your partners who benefits most from your program. “Those who benefit the most should pay the most.”

# Keep In Mind



- Know the difference between sustaining your program and securing match funds (different approaches)
- Collaborate with fund development experts and become an expert yourself
- Learn to tell your story better
- Identify new partners and sources of funding
- Don't look for money; look for partners
- Think long-term
- Expand the scope of your project to address the partners' needs; ex: lack of diversity in STEM workforce
- Expand your definition of financial support to include technology, expertise, materials, space, personnel, etc.
- Don't approach the process as a stressful endeavor; learn to enjoy this work; it feels good to sustain good work and good programs; it's fun 😊.

# Tulare County Office of Education



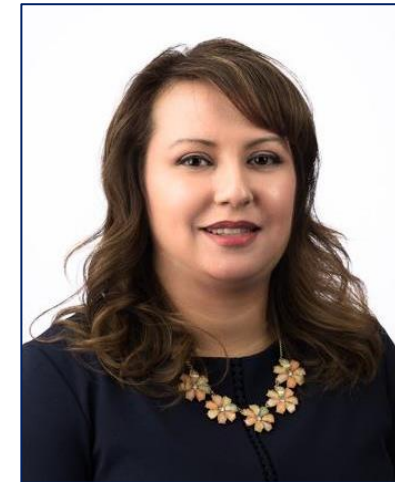
Donna Glassman  
Executive Director,  
Tulare County Office of  
Education



Dedi Somavia  
Assistant Superintendent of  
Human Resources,  
Visalia Unified School  
District



Rosa Montoya  
Principal  
Visalia Unified School  
District



Dr. Adriana Cervantes-  
González  
Coordinator and Lecturer  
California State University,  
Bakersfield



Shannon Moore  
Teacher,  
Visalia Unified School  
District





# Consultancy Protocol

1. Tulare Problem of Practice (5 min)
2. Questions from Dr. Hamdan (10 min)
3. Tulare Discussion (10 min)
4. Dr. Hamdan Discussion (10 min)
5. TQP Participant Reflections (5 min)

# Tulare County Problem of Practice

*How do we develop strategic partnerships for financial sustainability to continue the support of our teacher residency program beyond the life of the TQP grant?*

# Reflection Question

Small Group  
Breakouts

How will you apply the insights from today to financial sustainability planning in your grant?

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# Sustainability Resources and Next Steps

# Financial Sustainability Resources

## Grantee Spotlight:

**Planning for Financial Sustainability at Radford University and California State University, Dominguez Hills**

By Lauren K. B. Matlach



**Designing a Rigorous Micro-Credential Assessment Process to Verify Mastery of Competencies: Key Considerations**


JULY 2019



**Bite-Sized, Tailored, and Job-Embedded: Communicating the Value and Variety of Micro-Credentials in Education**

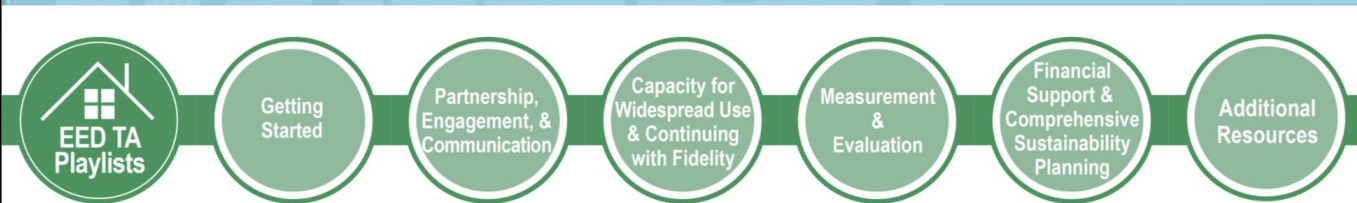
JULY 2019

# Sustainability Playlist and Meeting



The graphic features a blue city skyline background. In the center, three stylized figures (two adults and one child) are walking on a path of interlocking blue gears. The text 'SUSTAINING YOUR EED GRANT' is written in white, bold, sans-serif font on the left side of the graphic.

**SUSTAINING YOUR EED GRANT**



The flowchart consists of seven green circular nodes connected by a horizontal line. The first node contains a house icon and the text 'EED TA Playlists'. The subsequent nodes contain the following text: 'Getting Started', 'Partnership, Engagement, & Communication', 'Capacity for Widespread Use & Continuing with Fidelity', 'Measurement & Evaluation', 'Financial Support & Comprehensive Sustainability Planning', and 'Additional Resources'.

**What this playlist is:**  
A primary goal of the U.S. Department of Education's Effective Educator Development (EED) Program is to ensure that effective grant strategies are sustained after grant funding ends. That said, planning for sustainability is complex and requires systems change given the complexity of EED grants. All grantees develop logic models and project plans shortly after receiving their grant. These performance management tools are foundational to sustainability planning.

This playlist provides EED grantees a prioritized, sequenced list of resources to support their sustainability planning. All EED grantees can find value in the resources in this playlist.

***TQP Thought Lab:***  
*April 6, 12:00 – 1:00 pm EST*



# Seeking: Voices from the Field

- Write a blog entry (300-500 words) exploring how you are working through grant-related challenges and successes.
- Posted on Communities360 site and shared with the EED community via our regular e-mail updates.
  - Read by 545 readers in the grant community
  - Read by U.S. Department of Education

## Possible approaches:

- ✓ **3 key learnings** from this program meeting and how you are applying them in your grant.
- ✓ Share a **success story** of how you tackled a challenge related to a grant strategy.
- ✓ Describe **one significant impact** the grant is having on educators and/or students.

# We Value Your Feedback!

***Please fill out the survey using the QR code or click the link in the chat.***



Thank you!

# How to Contact Us

U.S. Dept. of Education

## Program Officers and Group Leaders

- Policy questions
- Project changes
- Data updates and amendments
- Performance and financial management questions

Louis.Edwards@ed.gov

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Christine.Miller@ed.gov

Cynthia.Obrien@ed.gov

Venitia.Richardson@ed.gov

Diana.Schneider@ed.gov

Patricia.Searles@ed.gov

## EED TA Center

- Technical assistance needs and questions
- Peer connections
- Communities360 questions

EED-TA@aemcorp.com

support@grads360.org

On Communities360

## EED Grantee Community

- FAQs, User Guide, and training material access
- Post discussion questions to engage with peers

EED-TA@aemcorp.com

