



Organizational Sustainability Planning

Through customized interventions, our team has fostered the development of hundreds of resilient and enduring organizations across Africa, Asia, and Latin America. Our organizational sustainability planning services focus on the financial health and strategic focus of clients, providing them with a platform from which to improve their service delivery and achieve greater impact.

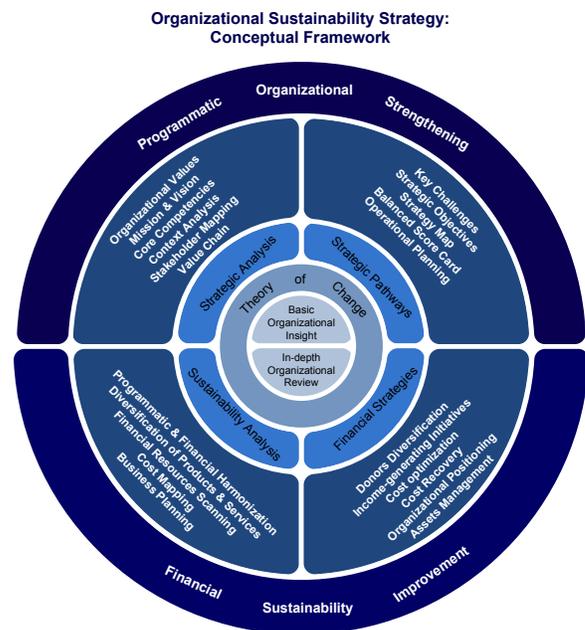
A sustainability strategy, framed within the organization’s mandate, deals with improving short-term stability and securing long-term viability. A sound strategy targets the organization’s resources gap, uncovers the keys to success, fosters value creation, and balances financial and programmatic priorities.

Successful entities have learned that sustainability is key to organizational development, both in terms of facilitating mission accomplishment and achieving high-impact. By approaching sustainability from a holistic perspective, our clients have managed to align financial strategies with strategic aims, streamline internal processes for better service, and foster continuous innovation through human capital development. These results are grounded in our balanced sustainability strategy that unveils viability drivers, builds upon the organization’s core competencies, and harness contextual opportunities.

Methodology

Root Change’s methodology fosters process ownership, organization-wide participation, and active learning. Through a set of diverse techniques inspired by the learning-by-doing approach, participants engage in creative thinking, individual reflection, collective synthesis, and consensus-building around key sustainability issues.

Based on extensive experience, Root Change has identified several components of a solid sustainability strategy. Working with our clients, we create a customized package that emphasizes the most relevant of the following activities:



- **Strategic Scanning** identifies key trends in the organization’s external and internal environment. As a result, major sustainability issues are surfaced and defined.
- **Niche Assessment** reviews how well the organization is using its capacities and assets to meet the needs of its sector and continue creating innovative revenue-streams.
- **Value Analysis** uncovers the linkages between primary and support activities within the organization’s value creation process. Unique, innovative responses are crafted to meet key stakeholders’ needs and expectations.
- **Financial Evaluation** looks at the capabilities, processes, and systems needed to manage the organization’s financial operations, to support decision-making processes at any level, and to comply with funders’ requirements.
- **Products and Services Identification** selects the more promising, viable solutions that the organization can produce and offer based on its core capacities, sector opportunities, funders’ priorities, and financial potential.
- **Income Diversification** involves careful identification of revenue mechanisms to expand sources of funding. This process fosters the selection of a customized set of strategies which include donor diversification, social entrepreneurship, and partnership.
- **Cost Mapping** identifies all information needs related to cost management. Financial information is organized by geographic region, source of funding, projects, cost type (direct or indirect), branches, etc. to meet internal and external requirements.
- **Organizational Positioning** facilitates the selection of the organization’s strategic posture and corporate image. Through this process the organization’s working approach is encapsulated according to its mission, core capacities, and the sector’s conditions.

Organizational Sustainability in Ecuador

Funded by USAID and implemented by Chemonics International, the CAIMAN Project was designed to conserve biodiversity in Ecuadorian indigenous territories. In this context, our team provided technical assistance on financial sustainability to key participants of the project: three indigenous federations and two supporting NGOs.

Taking into consideration local biodiversity and cultural conservation, Root Change’s approach towards financial sustainability focused on the building blocks of organizational viability, action plans, and social ventures development.

As a result of the process, participant organizations gained increased awareness in sustainability, improved programmatic and financial alignment, broadened their donor base, and crafted concrete action plans to advance the continuity of conservation initiatives and foster high-impact interventions.

Outcomes

Through Root Change’s facilitated organizational sustainability planning process, development organizations engage in a thorough analysis and design a tailor-made sustainability strategy. In addition, the capacity of key staff built to perform strategic analysis and manage and follow-up the implementation of the plan.

For more information on how you and your partner organizations can take advantage of Root Change’s Organizational Sustainability Planning services, please contact Jacob Gray at jgray@rootchange.org.