



Indiana State
Department of Health

INDIANA

Program Sustainability Guide

In support of
“Living a Healthy Life with
Chronic Conditions”



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Sustainability is the ability to maintain or support an activity or process over the long term.

The purpose of this guide is to give partners tools to develop and implement a sustainability plan.

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Sustainability

Sustainability has become an important issue for most organizations. The thought of how programs and services will be financially maintained is most often the primary interest – but several factors contribute to a program’s sustainability.

There are an overwhelming number of resources available on organizational sustainability - yet an evaluation from the TCC Group noted only 28 percent of surveyed national and local organizations felt they are “strong” in regards to organizational resource sustainability and 30 percent perceive themselves as “challenged.” In an attempt to assist Indiana partners in sustaining evidence-based programs, this guide has attempted to understand this disconnect and provide tools for partners to utilize.

Many resources were used in preparing this guide. We would like to thank the following for their Sustainability documents that were utilized.

- Oregon – Living Well Sustainability Toolkit
- Missouri’s Sustainability Toolkit
- Louisiana Implementation of the Stanford Chronic Disease Self Management Program (CDSMP) Policies and Procedures Manual
- Maine Living Well ... for Better Health – Toolkit to Implement CDSMP in Health Care Settings
- Hawaii Business Plan on Sustainability and Marketing for Evidence-based Program

CHANGE. Remember as you look at each area – CHANGE happens.

Consider the environment – organizational leadership, staff, volunteers, funding sources and partners. The plan needs to address this challenge of adapting and cultivating new resources.

The areas below are to be noted in the program’s sustainability plan. These areas will be briefly noted with a list of resources to utilize.

- **Organization**
- **Program**
- **Marketing**
- **Funding**

Develop a TEAM.

A team of various members from the organization and community should be asked to assist in the development of a sustainability plan. Consider the organization leadership, program staff and partners that will best aid in the effort as each area is considered. Invite each of those individuals to serve on that team.

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Sustainability Team Members Contact List
Tasks in Plan Development, Responsible member
Timeline of Plan Development
SWOT Analysis Instruction
SWOT Analysis Template

SWOT Analysis Instruction*

SWOT Analysis is a useful technique for understanding your **Strengths** and **Weaknesses**, and for identifying both the **Opportunities** open to you and the **Threats** you face. This can be used to assess an organization, program, or area of concern, such as marketing, finances, volunteers and staff.

Often, strengths and weaknesses are internal to your organization while opportunities and threats relate to external factors. Below each area is noted with possible questions for consideration.

Strengths:

- What advantages does your organization/program have?
- What do you do better than anyone else; What do you provide that no one else does?
- What unique resource can you have that others don't?
- What do people in your organization/program/community see as your strengths?

It might be beneficial to identify your strengths from not just an internal perspective but from the view of your customers and people in your market. Take a minute to consider your strengths in relationship to your competitors and their products, as well.

Weaknesses:

- What could you improve?
- What areas should you avoid?
- What are people in your market likely to see as weaknesses?
- Where do you have fewer resources than others?

Opportunities:

- What opportunities are available?
- What trends are you aware of that may develop your market?
- Useful opportunities can come from such things as:
 - Changes in technology, government policy, population profiles, local events.

Threats:

- What obstacles do you face?
- What are your competitors doing with success?
- Are there changes for your job, organization, program or services?
- Do you have bad debt or cash-flow problems?
- Could any of your weaknesses seriously threaten your business?

**Based on MindTools document*

SWOT Analysis Template

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

Organization

Organizational Leadership needs to be involved as a strong partner.

The future direction of an organization is controlled by the group's leadership. Leadership establishes the mission, vision, and priorities for the organization, as well as, solves problems and motivates and supports staff. Management of short and long-term funding allocations, services and programs provided, and staffing needs are also directed by an organization's leadership. These decisions are often made on the basis of "cost-effectiveness" and the impact of the program. It is important to remember the "impact of the program" should be defined through the eyes of those being served.

Consider all of the components of the organization's leadership. Organizational charts can assist in identifying all of the key members. For many nonprofit entities, the "Board of Directors" guides the organization's overall direction and activities to establish long- and short-term goals. Staff of the organization offers daily management of the entity to achieve the goals set forth by the Board. Members of the leadership staff of an organization may include: Chief Executive Officers (CEOs), Chief Financial Officers (CFOs), and Directors of Operations, Human Resources, Development and Fundraising, etc.

Managerial and systems support are a necessity as a sustainability plan is developed, implemented, and updated. Select a team with members of the board and staff leadership. The expertise of the organization's leadership will provide needed information and insight on the organization's sustainability plans in place or being created, as well as, the development of a program sustainability plan. It is essential for the organization and program leadership to communicate, motivate, make decisions, and hold all accountable to the mission and vision.

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Organization Questions to be answered

Organization Questions

- What is your organization's vision?
- What is your organization's mission?
- When was your organization founded?
- Is your organization a 501 (c) 3? When was this 501 (c) 3 established?
- Does the organization have a sustainability plan?
- What are the top five priorities of the leadership of those functions/services/programs?
- What are the organization's sources of funding?
- Are any of your current program expenses (including staff) being funded by the organization?
- How is the annual budget determined?
- Is one central person responsible for grant research, development, and evaluation?
- Does the leadership (Board of Directors and organization staff) know the details of your program?

Does the organization encourage cross-promotion of all programs? (e.g., If someone is in CDSMP and has arthritis, is that participant encouraged to attend Enhance Fitness?)

Program

Those involved with the daily implementation of a program are most aware of how it benefits participants. Making a plan and learning more ways to sustain the program are imperative to short- and long-term success.

Program logistics will be considered in this section, while marketing, partners, and funding will be addressed separately. The areas noted in the boxes below pertain to the logistics that might affect the program's sustainability. The tools for each area and to take into account in developing the sustainability plan.

CONSIDER. Where is the program now, what are the challenges and opportunities, and the program's future goals. A SWOT analysis is often used to address these questions. An action plan for specific goals identified will need to be developed. These and other tools to assist with these steps are provided.

Program Description

It is important to have a well thought out description of the program that is clear, concise, and easy to understand. It may be beneficial to answer a few questions about the program and how the program fits in the organization and community as this description is being written.

A clear description of the program will assist in the area of marketing. The first five questions are used in the construction of an "elevator speech" - a 30-second description of your program. These five questions are noted on the "Elevator Speech" questions in the Marketing Section.

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Program Questions to be answered
CDSMP Program Description Sample

Program Questions

- What does your program do?
- Who does your program serve?
- Why do they care? How does it help them?
- How is your program different?
- What is your company/nonprofit?
- Do you have success stories from past participants, community members, health care providers that detail their support? (Keep one on hand 😊)
- How does the program support the organization's vision and mission?
- How does your organization feel about your program? Do they find it is important to include in their program selection? Does your organization support the program - either financially or otherwise? Where does your program fit in your organization?
- Do you have proof that the program works? Simple evaluation? Evaluation methods?
- Quality of Life (CDC sample: http://www.cdc.gov/hrqol/hrqol14_measure.htm)
- Who attends the program (demographics, how many, etc.)?
- How many participants per class?
- Where do you conduct the programs?
- Any other information needed?

Program Capacity

As organizations evolve, there is a need to become more knowledgeable with respect to understanding and acquiring the service delivery skills necessary to go to scale. As an organization grows, a focus on staffing programs, making human resource decisions (including hiring and firing staff), recruiting volunteers, and training and development needs of both staff and volunteers to ensure the highest quality and quantity of services will be necessary times for staff and volunteers to discuss program strengths, needs, opportunities, ideas and challenges. Recognition of volunteers and staff for their input and abilities is also valuable to sustaining a program.

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Class Assessment

Staff Assessment

Volunteer Assessment

CDSMP Implementation Manual

(http://patienteducation.stanford.edu/licensing/Implementation_Manual2008.pdf)

CDSMP Fidelity Toolkit 2010

http://patienteducation.stanford.edu/licensing/Fidelity_ToolKit2010.pdf

Program Example – CDSMP “Living a Healthy Life with a Chronic Condition”

Key points in description:

- The CDSMP in Indiana is called **“Living a Healthy Life with a Chronic Condition.”** The Spanish version is entitled **“Tomando Control de su Salud.”** The CDSMP is a six-week program that meets for 2 ½ hours, one time a week. The program is an evidence-based program that is currently being offered in 48 states and 24 countries.
- Anyone with a chronic condition can participate. People have conditions such as diabetes, arthritis, high blood pressure, heart disease, chronic pain, anxiety, or others.
- Participants learn to live their lives with a chronic condition, find relief from pain and fatigue, find new ways to manage their health and work with their healthcare provider, and meet new people and share experiences.
- Presentation topics include: exercise and nutrition, medication usage, stress management, talking with your doctor or health professional, and dealing with emotions and depression.

****Add information on your local program – How long have you been doing the CDSMP?, How many participants have been helped? Include success story? The value of the program* (cost if charged &/or donation needed, local committed partners, thank you to grant funders.***

*A survey conducted in 2009 identified an average program delivery cost in Oregon of \$375 per participant. For more information on identifying the cost of delivering Living Well in your area, please see the National Council on Aging’s cost calculator at <http://www.ncoa.org/improve-health/center-for-healthy-aging/content-library/chronic-disease-1.html>)

Why is “evidence-based” important?

Evidence-based programs are quickly becoming the “best practice” model in assisting those in our communities in achieving healthy behaviors. ***They are essentially “proven to work .”*** They have been adapted from tested models and interventions and proven successful after extensive evaluation and published documentation of the outcomes of the program. *Stanford University completed the evaluation of the CDSMP using control/comparison groups and has evaluation and documentation to reveal the program effective across various chronic diseases and socioeconomic and educational levels to enable participants to manage progressive, debilitating illnesses. Further, it has been shown the health benefits persist over time.*

An Indiana CDSMP fact sheet was developed in 2012 that notes some of the Stanford findings. Please feel free to utilize this sheet to note the effectiveness of the program.

- [Indiana Data Snapshot – Living a Healthy Life with a Chronic Condition](#)

Staff Assessment

Staff Name	Staff Program Responsibilities	Percentage of time dedicated to Program	Leader Type (Master, Lay)	Dates/Times Available to Lead Program	Locations Will Do	# of Classes Will Do	Date Trained	Date Training Expires

Program Evaluation

Program evaluation may be necessary even when providing an evidence-based program. The benefit of an evidence-based program is that research has been conducted and the program has been proven effective to work. Although this research has been documented and published and is available to support the program, individual revenue sources may require specific program outcomes and data. The ability to provide this information makes a program more accountable and responsible. Organizations that collect and use data from program evaluation and use for planning and quality improvement efforts are significantly more sustainable than those that do not.

Some items an evaluation might seek to discover may include:

- Is the program conducted as designed?
- Are program materials appropriate for the participants who receive them?
- Are participants satisfied with services or training?
- Are the desired results of the program met (did participants improve knowledge, change in quality of life)?
- Are there unexpected benefits or problems with the program?

Organizations must determine what other evaluation may be needed, who the audience is for the information, and the best method to collect and assess the data. Consider what you need to know to make future decisions on the programs and what your funding sources need to know. Consider if the evaluation is to be on the delivery and implementation of the program (process evaluation) or the effect of the program on the participants (outcome evaluation).

For many organizations, information may already be gathered on the program and its participants that can be used in evaluation.

The number of programs conducted, cost of each program, program locations, program dates and times, leader names, number of and how people were referred, number of participants, participant attendance and participant demographics may be a few of these pieces of information. Many evidence-based programs provide an initial participant questionnaire to gather information, as well for another program. Observation, interview, self-reported or coach records of progress to obtain desired change to reach goal, and other methods may be used. Other information may include quality of life or health measurements. Questionnaires, observation, interviews, and other ways may be utilized in this evaluation.

There are many resources to assist in this valuable piece of sustainability. The effort to evaluate is necessary to maintaining an effective program.

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CDC Framework for Program Evaluation (<http://www.cdc.gov/eval/framework/>)

Community Toolbox Intro to Evaluation (<http://ctb.ku.edu/en/table-of-contents/evaluate/evaluation>)

CDC Division of Heart Disease and Stroke - Writing SMART Objectives (http://www.cdc.gov/dhdSP/programs/nhdsp_program/evaluation_guides/docs/smart_objectives.pdf)

CDC Logic Model Tool

CDSMP Attendance Log (<http://www.in.gov/isdh/files/AttendanceLog.pdf>)

CDSMP Participant Information Survey (<http://www.in.gov/isdh/files/ParticipantInfoSurvey.pdf>)

CDSMP Main Points in Data Collection (http://www.in.gov/isdh/files/Main_Points_in_Data_Collection.pdf)

CDSMP Leader Evaluation Form (http://www.in.gov/isdh/files/CDSMP_LEADER_EVALUATION_FORM_.pdf)

CDSMP Participant Quality of Life Questionnaire

Evaluating Outcomes on CDSMP – Lorig, Laurent (<http://patienteducation.stanford.edu/research/primer.html>)

NCOA Review of Findings - CDSMP (<http://www.ncoa.org/chamodules/documents/ReviewFindingsCDSMPOutcomes.pdf>)

Effect of a Self-Management Program on Patients with Chronic Disease – Lorig 2001 (http://www.acponline.org/clinical_information/journals_publications/ecp/novdec01/lorig.htm)

Constructing Simple Logic Models

A useful logic model can be constructed in a few simple steps, as shown here using the CLPP program for illustration.

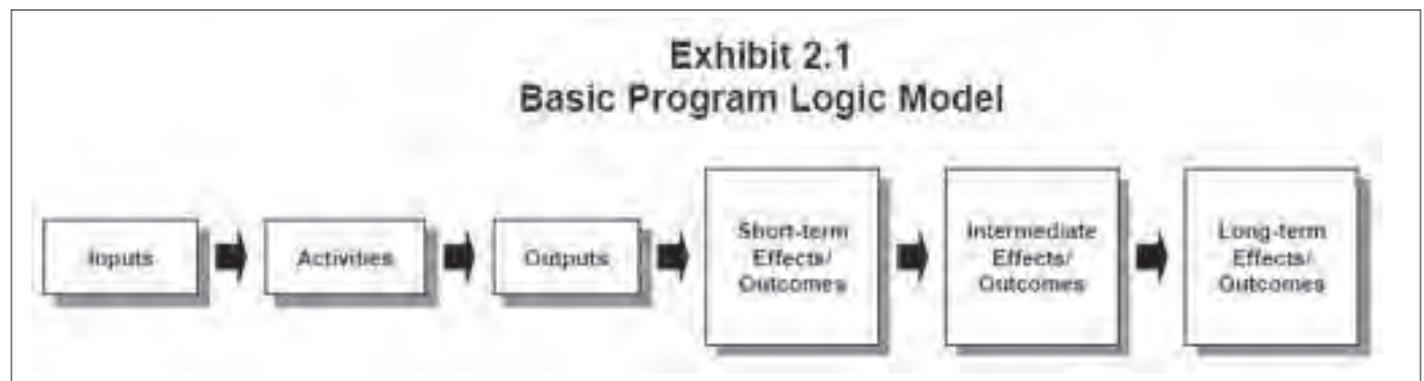
Develop a list of activities and intended outcomes. While logic models can include all of the components in the text box, we will emphasize using logic models to gain clarity on the relationship between the program’s activities and its outcomes. There are many ways to develop a list of activities and outcomes that you will incorporate into your model, and indeed you may already have a comprehensive list from the program description. But, to stimulate the creation of a comprehensive list, any of the following methods will work.

Logic Model Components

Logic models may depict all or only some of the following components of your program description, depending on their intended use:

- **Inputs:** Resources that go into the program and on which it is dependent to mount its activities.
- **Activities:** Actual events or actions done by the program and its staff.
- **Outputs:** Direct products of program activities, often measured in countable terms (e.g., the number of sessions held.)
- **Outcomes:** The changes that result from the program's activities and outputs, often in a sequence expressed as short-term, intermediate, and long-term outcomes.
- **Review any information available on the program**—whether from mission/vision statements, strategic plans, or key informants—and extract items that meet the definition of activity (something the program and its staff does) and of outcome (some change in someone or something, other than the program and its staff, that you hope will result from the activities); or
- **Work backward from outcomes.** This is called “reverse logic” modeling and may prove helpful when a program is given responsibility for a new or large problem or is just getting started. There may be clarity about the “big change” (most distal outcome) the program is to produce, but little else. Working backward from the distal outcome by asking “how to” will help identify the factors, variables, and actors that will be involved in producing change; or
- **Work forward from activities.** This is called “forward logic” modeling and is helpful when there is clarity about activities but not about why they are part of the program. Moving forward from activities to intended outcomes by asking, “So then what happens?” is often helpful in elaborating downstream outcomes of the activities.

Logic models may depict all or only some of the elements of program description (see above text box), depending on the use to which the model is being put. For example, Exhibit 2.1, below, is a simple, generic logic model. If relevant to the intended use, the model could include references to the remaining components of program description, such as “context” or “stage of development.” Likewise, some of the examples presented below focus mainly on the connection of a program’s activities to its sequence of outcomes. Adding “inputs” and explicit “outputs” to these examples would be a simple matter if needed.



Quality of Life Questionnaire



Living a Healthy Life
With Chronic Conditions

Participant Questionnaire

(Adapted from the LSU and ULM CDSMP Survey)

Please print clearly.

Today's date

		/			/				
Month			Day			Year			

Name: _____

Address: _____

City, State, Zip Code: _____

Telephone: _____

Email: _____

1. In general, would you say your health is: *(Please circle one number.)*

Excellent	Very Good	Good	Fair	Poor
1	2	3	4	5

2. How much time during the past six months: *(Please circle one number for each question.)*

	Never	Almost Never	Sometimes	Fairly Often	Very Often	All of the time
Did you feel exhausted?	0	1	2	3	4	5
Did you have a lot of energy?	0	1	2	3	4	5
Did you feel tired?	0	1	2	3	4	5
Did you have enough energy to do the things you wanted to do?	0	1	2	3	4	5
Did you feel full of pep?	0	1	2	3	4	5

Name: _____

3. How much time during the past six months: *(Please circle one number for each question.)*

	Never	Almost Never	Sometimes	Fairly Often	Very Often	All of the time
Were you discouraged by your health problems?	0	1	2	3	4	5
Were you fearful about your future health?	0	1	2	3	4	5
Was your health a worry in your life?	0	1	2	3	4	5
Were you frustrated by your health problems?	0	1	2	3	4	5

4. During the past week, even if it was not a typical week for you, how much total time (for the entire week) did you spend on each of the following: *(Please circle one number for each question.)*

	None	Less than 30 minutes per week	30-60 minutes per week	1-3 hours per week	More than 3 hours per week
Stretching exercises or flexibility (range of motion, balance exercises)	0	1	2	3	4
Strengthening (use of weights or weight bearing exercise)	0	1	2	3	4
Walk for exercise	0	1	2	3	4
Swimming or aquatic exercise	0	1	2	3	4
Bicycling (including stationary exercise bikes)	0	1	2	3	4
Other aerobic exercise equipment (Stairmaster, rowing, skiing machine, etc.)	0	1	2	3	4
Other aerobic exercise Specify _____	0	1	2	3	4

Name: _____

5. When you visit your doctor, how often do you do the following: *(Please circle one number for each question.)*

	Never	Almost Never	Sometimes	Fairly Often	Very Often	All of the time
Prepare a list of questions for your doctor.	0	1	2	3	4	5
Ask questions about the things you want to know and things you don't understand about your treatment.	0	1	2	3	4	5
Discuss any personal problems that may be related to your illness.	0	1	2	3	4	5

6. In the past 6 months:

How many times did you visit a physician? Do NOT include visits while in the hospital or the hospital emergency room.	Visits _____
How many times did you go to a hospital emergency room?	Times _____
How many different times did you stay in a hospital overnight or longer?	Times _____
How many total NIGHTS did you spend in the hospital?	Nights _____

Thank you!

Marketing

Marketing Plan

Communication is necessary to build relationships and ensure that a wide range of people in your community have a clear understanding about the organization and its programs, as well as the programs' benefits, successes, and challenges. Clear, concise, and consistent messages need to be developed and utilized for each appropriate audience.

In designing a marketing plan, consider the following questions:

1. What are the goals for the communication?
2. Who are the target audiences?
3. What are the best messages (main messages), methods, and media types to reach each target audience?
4. Who can be utilized as a partner to assist in each communication effort?
5. What strategies will be used to reach each audience?
6. How will the communication efforts be evaluated? How will you know it works?

Basics include:

1. What you're going to do
2. When you're going to do it
3. Who is going to do it
4. How much it will cost
5. How you will know you have achieved your objectives

Creating the marketing plan will help you identify and define whom you need to reach, what you want them to know, and how you will reach them.

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Communication Plan

10 Steps to Communications Planning

Messaging Planning Tool

Elevator Speech Template

CDSMP Elevator Speech Example

CDSMP Sample Presentation

Communication Plan

Goal 1:

SMART Objective:

Target Audience:

Tactic / Strategy	Key Message	Timeline	Staff Responsible	Budget	Notes

Goal 2:

SMART Objective:

Target Audience:

Tactic / Strategy	Key Message	Timeline	Staff Responsible	Budget	Notes

Goal 3:

10 Steps to Effective Communications Planning*

- **Step 1** – Set your goal. What do you want to happen?

- **Step 2** – Select primary and secondary target audiences for each goal and/or objective?

- **Step 3** – Develop your objectives. Are they SMART?

- **Step 4** – What is/are your key messages. What do you want to say?

- **Step 5** – Outline your strategies. What are you going to do? Be specific.

- **Step 6** – Establish the budget. How much do you have and how much will it cost?

- **Step 7** – Assign a project lead to the strategies?

- **Step 8** – Create a timeline for each strategy?

- **Step 9** – Implement your plan.

- **Step 10** – Evaluate your success. Did it work?

*Based on North Carolina Branch of Nutrition & Physical Activity

Message Planning Tool

Outline a message plan that relates to program goals and objectives. Note the specific target audiences you want to reach. Consider what channels you will use to get your message out. Determine if there is a charge for the channel you would like to use and resources available. Include partnerships that may assist in getting your message out.

Questions	Participants	Partners	Others
What do you want this target audience to do? <i>(this will help you determine your messages; for example, do you want participants to attend your workshop, do you want to recruit volunteers, do you want partners to support the program)</i>			
What are your messages for this audience? <i>(may consider benefits of program, success of programs, participant success stories, cost savings benefit of program)</i>			
How will you get these messages to this audience? <i>(TV, radio, newspaper, newsletters, social networking sites, one-on-one communication, seminars, etc. Helpful hint: make sure the channel you use is important to the audience you are targeting and within your budget.)</i>			
In what form will your message be delivered? <i>(Will it be a poster, a speech, a press release, a PSA?)</i>			
How often will you deliver these messages? <i>(Will you need to send messages out weekly, monthly, quarterly?)</i>			
What materials will you need to deliver your messages? <i>(Do you need ads, posters, brochures, etc.? Who will create these materials? When do you need them completed? What is your budget?)</i>			
How will you track your progress in getting your messages out? <i>(Can you keep track of the dates and how many times you delivered your message, or your reach – how many people your message reached?)</i>			
How will you know if you reached your target audience, and that they acted upon your messages? <i>(Can you track how many people showed up to your event; how many read an article and clicked on your web site; how many partners supported the program?)</i>			

Elevator Speech Template

QUESTION	ANSWER
1. What does your program do?	
2. Who does your program serve?	
3. Why do you care? How does your program help them?	
4. How is your program different?	
5. What is your company/nonprofit?	
IF YOU ARE ASKED TO SAY MORE, HAVE A QUICK SUCCESS STORY OF PERSON FROM PROGRAM	

CDSMP Elevator Speech Example*

“Living a Healthy Life with Chronic Conditions” is a workshop for people with lifelong health conditions, such as heart disease, arthritis and diabetes.

The six weekly sessions cover things like pain and fatigue, eating well, fun ways to get active, and tips for talking with your doctor and family about your health. It’s also a great way to meet other people dealing with similar health issues.

It works: Participants have less pain, more energy and fewer hospitalizations.

“Living a Healthy Life” is supported by [insert your organization’s name] and is led by trained volunteer leaders who have health conditions themselves. There’s also a culturally appropriate, Spanish-language version called *Tomando Control de su Salud*. (optional)

*(If time allows, always share a success story!) People really love the workshops. For example, [insert a story about a person who took the class and has seen real benefit].

**Based on Elevator Speech Sample from Oregon Sustainability Manual*

Marketing to Participants

After scheduling a program, the next step is to motivate participants to attend. Participation in the program is often more difficult than expected. Take the time to plan each program individually. Every community is different and needs to be approached as a unique opportunity. Two assessments are included in the Tools to assist in this process.

Defining your target audience for each program is an important step. Take time to define that group(s) you want to reach and consider the appropriate methods, messages, and media to best access these group(s). Determine which groups of people have attended past programs and which groups would most benefit from the program. Consider where past participants heard about the program and what message(s) encourage them to attend.

Consider the program type when determining the messages and media, as well. Programs that require a commitment of time and resources may need to be approached differently than a program that will require little time and provide an incentive to attend.

Messages must always be clear and concise. Completing an “elevator speech” may assist in developing other messages for participants. An elevator speech should answer five essential questions:

- What does your program do?
- Who does your program serve?
- Why do they care? How does it help them?
- How is your program different?
- What is your company/nonprofit?

Messages are needed to define the program and its benefits. These messages may want to include the value of the program and the benefit of sustainability. Simple statements noting the cost of the program to the organization per person and the funding source that has made it possible for the organization to provide the program are easy to incorporate into the message.

Personal success stories are of great value in communicating the importance of the program to an individual. Even a community announcement or basic invitations must be clear and provide the most important information and details: date, time, location, registration and contact information.

The final piece to consider is what media to utilize. This is not just dependent on the target audience, program type, and message to be delivered, but what is available and within the community and within the budget. Take the time to research the community through partners and/or the internet. Media types such as presentations, face to face meetings, recruitment letters from healthcare providers, personal stories in newspapers or television, faith-based outreach, and other methods may be useful. (The Participant Marketing Assessment is a good tool to use before and after a program to determine what was most effective.) Follow-up communication is just as important. Reminder and thank you letters are always appreciated by participants.

All Indiana agencies implementing the CDSMP will be consistent in their marketing. The program title to use for the program is **“Living a Healthy Life with a Chronic Condition.”** The Spanish version title is **“Tomando Control de su Salud.”** Everyone will use the same logo. Materials are provided and available at the ISDH website to be used. These materials can be personalized as needed. Copies of these materials are in the Tools section, as well as a recruitment presentation.

■ tools

Marketing Assessment & Implementation

Participant Marketing Assessment

CDC How to Write Program Success Stories
(<http://apps.nccd.cdc.gov/dchsuccesstories/>)

CDC Media Access Guide
(<http://www.cdc.gov/nccdphp/dch/programs/healthycommunitiesprogram/tools/pdf/mediaaccessguide.pdf>)

CDSMP Press Release Template

CDSMP Community Announcement Template

CDSMP PSA Template

Photo and Video/Audio Release Form

CDSMP Sample Newsletter Article

CDSMP Sample Healthcare Newsletter Article

Marketing Assessment & Implementation of a Program

When implementing a program, it is challenging to locate, invite, and encourage participation. Communication of the program availability in several ways and various locations is essential to success. Each community is unique and diverse methods of communication should be utilized. Therefore several tools have been provided, but each can be used independently or combined as needed.

IMPLEMENTING STEPS

WHERE TO START – Determine Who, Where, What, When

- 1.) **"Who"** – Determining "who" you are trying to reach to invite is one of the most vital steps. *Most programs are intended for a select group of people. Take time to define that group and consider the appropriate methods, messages, and media to best reach these people. Keep in mind, often for every 10 people that get the information – one will attend.*
 - *Also, decide who within your organization will lead the project, those that will assist and the responsibilities of each. Also, determine partners in your community that might be available to assist you.*
- 2.) **"Where"** – *There are many media options, methods, and locations to utilize when you are promoting your event. Take some time to research those outlets and fill out the sample "Where Worksheet & Tips" to assist you in implementing.*
- 3.) **"What"** – *Decide which tools from the "Resources" list will best support your efforts.*
- 4.) **"When"** – *Make a plan. In general, allow six to eight weeks before the class start date to promote and recruit participants. Utilize a timeline to determine deadlines for certain materials and media. (Sample below)*

8 weeks	7 weeks	6 weeks	5 weeks	4 weeks	3 weeks	2 weeks	1 week
<i>Make the plan – answer questions</i>	<i>Start preparing materials – especially flyers</i>	<i>Distribute flyers</i>	<i>Continue distribution of flyers & newsletters</i>	<i>Email PSA's</i>	<i>Consider local media opportunities/ Personal stories</i>	<i>Check & make sure press release & comm. Announce running</i>	<i>Tie up any loose ends</i>
<i>Determine partners</i>	<i>Add program to your website & newsletter</i>	<i>Send out to Newsletters, monthly publications</i>	<i>Prepare PSA's</i>	<i>Email press release & community announcement</i>	<i>Contact local media when necessary to promote</i>	<i>Do interviews & stories when possible</i>	<i>Continue interviews when possible</i>
Always Consider deadlines & distribution schedules	<i>Consider personal stories / success stories from past participants</i>	<i>Contact local diabetes support groups & ask to present to class</i>	<i>Prepare Press release & community announcement</i>	<i>Continue to work online & add to community calendars/ social media</i>	<i>Ask newspaper health if interested in personal story / or tie to current event (diabetes month)</i>	<i>Continue to work with social media when available</i>	<i>Continue to work with social media when available</i>
		<i>Ask partners to add to website/social media</i>	<i>Begin to work online & add to community calendars/social media</i>	<i>Contact churches & other orgs. Regarding inserts</i>	<i>Continue distribution of flyers & newsletters</i>		

WHERE WORKSHEET & TIPS

ALWAYS REMEMBER YOUR TARGET MARKET!

LOCAL MEDIA

NEWSPAPERS: (press release, community announcement)

- Make a list below of those local daily, weekley, and monthly publications (look online for assistance).
- Consider all ethnic publications utilized by your target market
- Add your event to their online events calendar when possible

***Tip: Submit your press release and community announcement to the Assistant News Editor or Health Reporter by sending the above in the body of the email – not as an attachment. When email is not available, fax to the correct name with cover sheet that states “THANK YOU IN ADVANCE FOR RUNNING THIS ANNOUNCEMENT”**

- 1.) _____
- 2.) _____
- 3.) _____
- 4.) _____
- 5.) _____

RADIO: (PSA, community announcement)

- Make a list below of those local radio station (look online for assistance).
- Consider all ethnic stations utilized by your target market
- Add your event to their online events calendar when possible

***Tip: When possible email or submit online or FAX to the PRODUCER/STATION MANAGER with cover sheet that states “THANK YOU IN ADVANCE FOR RUNNING THIS ANNOUNCEMENT”**

- 1.) _____
- 2.) _____
- 3.) _____
- 4.) _____
- 5.) _____

NEWSPAPERS: (press release, PSA, community announcement)

- Make a list below of those local televeision station (look online for assistance).
- Consider all ethnic stations utilized by your target market
- Add your event to their online events calendar when possible

***Tip: When possible email or submit online or FAX to the PRODUCER/NEWS MANAGER with cover sheet that states “THANK YOU FOR ADDING TO COMMUNITY ANNOUNCEMENTS”**

- 1.) _____
- 2.) _____
- 3.) _____
- 4.) _____
- 5.) _____



LOCAL HEALTHCARE

- Make a list below of those hospitals with diabetes support groups (look online for assistance). **DON'T FORGET THE LOCAL HEALTH DEPARTMENT.**
- Consider other healthcare providers: doctors, eyecare, feet, pharmacists
- Add your event to their online hospital events calendar when possible

***Tip: When possible CONTACT BY PHONE & then email NEWSLETTER, COMMUNITY ANNOUNCEMENT, AND FLYER to the Diabetes Educator, Community Nursing, Marketing. Ask that it be utilized for employees, as well as, their patients. If the support group is meeting, ask if you can come make an announcement at the class and distribute flyers!**

- 1.) Don't forget Kroger, Walmart, and other Pharmacies – they will gladly hang a flyer _____
- 2.) Don't forget Community Health Centers and Free Clinics _____
- 3.) _____
- 4.) _____
- 5.) _____

LOCAL ORGANIZATIONS/CHURCHES

- Make a list below of those that most meet your target market needs (look online for assistance). **DON'T FORGET those noted below.**
- Add your event to their online events calendar (even the Chamber and Community Pages) when possible

***Tip: When possible CONTACT BY PHONE & then email or mail LETTER, NEWSLETTER, COMMUNITY ANNOUNCEMENT, BULLETIN INSERTS, AND FLYER to the DIRECTOR, PASTOR, ETC. Ask that it be utilized for employees, as well as, their patients. If there is a group meeting, ask if you can come make an announcement at the class and distribute flyers!**

- 1.) Community Centers, Childcare, YMCA, Senior Centers, etc. _____
- 2.) Non-profits, Food Banks, Schools, Libraries _____
- 3.) _____
- 4.) _____
- 5.) _____

BUSINESSES/ETC.

- TAKE FLYERS EVERYWHERE YOUR TARGET MARKET SHOPS AND RECEIVES SERVICES (look online for assistance). **DON'T FORGET those noted below.**

Tip: When necessary GET PERMISSION, TAKE YOUR OWN TAPE, AND PRINT IN COLOR.

- 1.) Grocery Stores, Restaurants, Barber/Beauty shops, small retailers _____
- 2.) Laundromats, Cleaners _____
- 3.) Apartment Complexes _____
- 4.) Cell phone companies _____
- 5.) _____



ONLINE/SOCIAL MEDIA

- *Post on all community announcement boards*

Utilize all social media you are comfortable with – Facebook, Twitter, Youtube, Texts – send out invites and remember to utilize during the program as well – to keep the community up to date on progress of class.

Assessment of Marketing to Participants (by individual program)

Program Date: _____

Program Location: _____

Number of Participants: _____

Promotion/Marketing used:

Marketing utilized	“Number” of used/aired/etc.	“Where” utilized/published	Number attended from this source
Flyers			
Posters			
Registration Brochures			
Presentations			
Social Media (Facebook, Twitter)			
Texting			
Newsletter			
Other Print (Bulletins – Church, Utility, etc)			
Community Announcement Newspaper			
Community Announcement TV			
Community Calendars (Internet)			
Faith based promotion (bulletins)			
Press Release			
Newspaper AD (Earned)			
Newspaper Ad (Paid)			
Radio PSA			
TV PSA			
Radio/TV Ad			
“Word of Mouth”/from a friend/family			

Living a Healthy Life with a Chronic Condition

Put Life Back Into Your Life

[YOUR CITY, IN] — Over 50 percent of adults in Indiana reported having a chronic condition in 2010. Learning to manage diabetes, arthritis, heart disease and other chronic illness can be hard, but [Organization name] has good news for people with a chronic condition.

Have a goal and make a plan to better manage their chronic illness. Discovering new ways to manage pain and fatigue, discuss your healthcare with your medical team and talk with your family about your illness can help put life back into your life. To educate and support those with chronic conditions, the [Organization name] will be offering the Living a Healthy Life with a Chronic Condition on [DATE] at [LOCATION].

“Chronic conditions are lifelong health concerns”, states [Organization Director Name]. “It is easier to manage your condition when you have the support you need”.

[Director name]. Living a Healthy Life with a Chronic Condition is a series of classes to provide its participants with resources and empower them as they set those goals.

Living a Healthy Life with a Chronic Condition classes will begin meeting on [DATE] at [LOCATION]. For more information or to register, please call [PHONE NUMBER] or email: [EMAIL ADDRESS].

For more information on [Organization name] : [website address]

###

CDSMP Radio PSA Sample

PUBLIC SERVICE ANNOUNCEMENT

**Living a Healthy Life with a Chronic Condition
Put Life Back Into Your Life**

[10 seconds]

{Organization Name} IS OFFERING THE LIVING A HEALTHY LIFE WITH A CHRONIC CONDITION – TO EMPOWER PEOPLE WITH DIABETES, ARTHRITIS, HEART DISEASE, OR ANOTHER CHRONIC CONDITION TO PUT LIFE BACK IN THEIR LIFE. CLASSES START ON {DATE AT TIME}. FOR INFORMATION CALL {PHONE NUMBER}.

###

[30 seconds]

HAVING A CHRONIC CONDITION IS SERIOUS AND IT’S HARD WORK MANAGING IT EVERY DAY. BUT THERE’S HOPE. YOU CAN DISCOVER WAYS TO MANAGE YOUR PAIN, FATIGUE AND OTHER DAILY CHALLENGES OF HAVING DIABETES, ARTHRITIS, HEART DISEASE OR ANOTHER CHRONIC CONDITION.

{Organaization Name} IS OFFERING THE LIVING A HEALTHY LIFE WITH A CHRONIC CONDITION PROGRAM – TO SUPPORT AND EMPOWER YOU TO MAKE DAILY CHANGES TO PUT LIFE BACK IN YOUR LIFE. CLASSES START ON {DATE AT TIME}. FOR INFORMATION CALL {PHONE NUMBER}.

###

[45 seconds]

HAVING A CHRONIC CONDITION IS SERIOUS AND IT’S HARD WORK MANAGING IT EVERY DAY. BUT THERE’S HOPE. YOU CAN DISCOVER WAYS TO MANAGE YOUR PAIN, FATIGUE AND OTHER DAILY CHALLENGES OF HAVING DIABETES, ARTHRITIS, HEART DISEASE OR ANOTHER CHRONIC CONDITION.

IT IS EASIER TO MANAGE YOUR CHONRIC CONDITIONS, WHEN YOU HAVE A GOAL AND MAKE A PLAN. {Organaization Name} IS OFFERING THE LIVING A HEALTHY LIFE WITH A CHRONIC CONDITION PROGRAM – TO TEACH YOU MORE ABOUT HOW TO BETTER NUTRITION, EXERCISE AND TREATMENT CHOICES. CLASSES WILL START ON {DATE AT TIME}. PUT LIFE BACK IN YOUR LIFE. FOR INFORMATION CALL THE {Organaization Name} AT {PHONE NUMBER}. THAT WAS {PHONE NUMBER}.

###

Contact Information:
YOUR ORGANIZATION CONTACT PERSON
ADDRESS
PHONE NUMBERS
EMAIL
WEBSITE

[Empty rectangular box for contact information]

[INSERT ORGANIZATION LOGO
ADDRESS
PHONE NUMBER
EMAIL]



Living a Healthy Life
With Chronic Conditions

[Sample Newsletter]

Living a Healthy Life with a Chronic Condition

Put Life Back Into Your Life

[Organization name] has good news for people with chronic conditions. People with diabetes, arthritis, heart disease or other chronic conditions have hope. Find the support and feel empowered as you learn new ways to handle pain and fatigue, discuss your healthcare with your medical team and talk about your illness with your family. To educate and support those with chronic conditions, the [Organization name] will be offering the Living a Healthy Life with a Chronic Condition program on [DATE] at [LOCATION].

"Ninety-one percent of all older adults have at least one chronic condition, 73 percent have at least two. Managing a disease is not easy but the benefits are worth the effort" states [Organization Director Name]. "It is easier to manage your chronic condition, when you have a goal and make a plan." continues .

Living a Healthy Life with a Chronic Condition is a series of classes to provide its participants with resources and support as they set those goals.

Living a Healthy Life with a Chronic Condition classes will begin meeting on [DATE] at [LOCATION].

**For more information or to register, please
CALL [Phone Number] FOR MORE INFORMATION
or email: [EMAIL ADDRESS].**

For more information on [Organization name]: [website address]

###

[INSERT ORGANIZATION LOGO
ADDRESS
PHONE NUMBER
EMAIL]



Living a Healthy Life
With Chronic Conditions

[Sample Newsletter]

Living a Healthy Life with a Chronic Condition

Put Life Back Into Your Life

[Organization name] has good news for people with chronic conditions. People with diabetes, arthritis, heart disease or other chronic conditions have hope. Find the support and feel empowered as you learn new ways to handle pain and fatigue, discuss your healthcare with your medical team and talk about your illness with your family. To educate and support those with chronic conditions, the [Organization name] will be offering the Living a Healthy Life with a Chronic Condition program on [DATE] at [LOCATION].

"Ninety-one percent of all older adults have at least one chronic condition, 73 percent have at least two. Managing a disease is not easy but the benefits are worth the effort" states [Organization Director Name]. "It is easier to manage your chronic condition, when you have a goal and make a plan." continues .

Living a Healthy Life with a Chronic Condition is a series of classes to provide its participants with resources and support as they set those goals.

Living a Healthy Life with a Chronic Condition classes will begin meeting on [DATE] at [LOCATION].

**For more information or to register, please
CALL [Phone Number] FOR MORE INFORMATION
or email: [EMAIL ADDRESS].**

For more information on [Organization name]: [website address]

###

Marketing to Partners

Although many aspects of communication for participants and partners are similar, it is important to approach each in the most effective ways. Both areas require time and consideration of the specific target group you are trying to reach and the message you want to convey. The messages may be varied for partners with different purposes. Partners may support the program in various ways including:

- Provide referrals for participation in program
- Provide free meeting space for workshops or leader trainings
- Provide grants, funding, or in-kind support
- Offer staff time to assist with the promotion and recruitment of participants for a program or overall program needs
- Allow advertisement of or promotion of program by providing free or low cost advertising
- Participate in the program sustainability team or other advisory group
- Serve as or allow employees to serve as volunteers for the program

An elevator speech is a good tool for both participants and partners. The same questions may be utilized for both participants and partners, but emphasis on different parts of the message may be necessary. The “success story” and sustainability messages may highlight different aspects of the program for partners and the participant versions. Messages need to be utilized to reach new audiences to initiate and develop partners, as well as inform partners of the program’s activities and successes.

Tools to reach partners in some of the above areas are included. Personalization may be needed on many of these tools. Also, consider when these tools are appropriate and when face-to-face presentations are most useful.

Brochures, fact sheets, and other materials are useful references for partners. Please note these resources are not exhaustive and other communication may be needed at times.

CONSIDER. Follow-up communication is very important to include in partner messages. Thank you letters, success stories, photos of event participants, volunteers, and use of partner logos are essential elements in developing relationships with partners and further establishing the organization’s and program’s credibility.

■ tools

Partner Marketing Assessment

CDC How to Write Program Success Stories
<http://apps.nccd.cdc.gov/dchsuccesstories/>

CDSMP Sponsorship Letter

CDSMP Sponsorship Form

CDSMP Sample Provider Recruitment Letter

CDSMP Provider to Patient Letter

CDSMP Data <http://www.in.gov/isdh/files/cdsmp-data2012.pdf>

Healthy Aging Fact Sheet NCOA http://www.ncoa.org/assets/files/pdf/FactSheet_HealthyAging.PDF

NCOA Health Promo Fact Sheet <http://www.ncoa.org/improve-health/center-for-healthy-aging/content-library/Value-of-Standard-Chronic-Disease-Self-ManagementProgram.PDF>

Assessment of Marketing to Partners (by individual program)

Program Date: _____

Program Location: _____

Number of Participants: _____

Promotion/Marketing used:

Marketing utilized	“Number” of used/aired/etc.	“Where” utilized/published	Number attended from this source
Letter from Provider/Partner to Patient			
Postcard from Partner to Patron			
Phone call from Partner to Patron			
Email from Partner to Patron			
Text from Partner to Patron			
Flyers (Healthcare provider, pharmacist office, other)			
Posters(Healthcare provider, pharmacist office, other)			
Registration Brochures (Healthcare provider, pharmacist office)			
Promoted on Social Media by Provider/Partner			
Promoted on Provider/Partner website (link to your page or not ?)			
Article in Newsletter			
Presentation/Announcement from Partner to Patrons			
Advertisement/Insert in Bulletin (faith-based or event program)			
Direct Mail from faith-based leader or community leader to patrons			
Other _____			



"Put Life Back in Your Life"

We are proud to offer you a wonderful opportunity to sponsor our **Living a Healthy Life with Chronic Conditions** workshop. This Stanford University evidence-based program consists of six weekly 2½ hour classes for people with chronic health concerns, such as heart disease, diabetes, high blood pressure, cancer and others. Participants learn how to manage their health conditions by setting goals and taking action in areas of nutrition, exercise, stress management, relaxation and more.

Sponsors of the **Living a Healthy Life with Chronic Conditions** provide funds toward the operating specific to the six-week workshop. Participant workbooks, relaxation CDs, refreshments and marketing materials are just a few of the costs to offer a workshop. Sponsorships opportunities are available to all organizations.

The following are the following four levels:

1. Platinum
2. Gold
3. Silver
4. Bronze

Participants will have an opportunity to view items on a display table each week. Sponsoring organizations are able to place marketing brochures and other promotional health related items on this table to reach participants with their message.

Sponsors may not visit the workshop but may enroll as a participant. No exceptions per Stanford University requirements.

Steps to become a Sponsor

- o Sponsor agency and (***your organization here***) will agree on sponsorship level
- o Sponsor agency and (***your organization here***) will sign contract of terms. The original contract will be retained at (***your organization here***), all other parties will be provided a copy for their files.
- o Payment will be received within 7 days of agreement signing. Sponsorship benefits shall not be provided prior to payment.

Contact:

(***your organization here***)

Contact Name

Address

Phone Number

Email

Website

*Based on Louisiana CDSMP materials



“Put Life Back in Your Life”

Sponsorship Levels

Sponsorship provides:

- 6 week workshop for up to XX participants at XX location
- Participant weekly materials
- XX Participant workbooks
- XX Relaxation CDs
- Marketing materials and outreach time
- Healthy refreshments each week
- **ADD OTHER ITEMS AS NEEDED**

Platinum Level Sponsor:

- Sponsor acknowledgement and logo placed on all marketing and registration materials
- Sponsor acknowledgement in all press releases and newsletter articles
- Sponsor acknowledgement and logo on all workshop signage and slides
- A banner in workshop room during class (Sponsor provides banner)
- Sponsor acknowledgement and logo sticker inside all workbooks and CDs
- Opportunity to provide marketing brochure and health related promotional items for display table

Gold Level Sponsor:

- Sponsor acknowledgement and logo placed on all marketing and registration materials
- Sponsor acknowledgement in all press releases and newsletter articles
- Sponsor acknowledgement and logo on all workshop signage and slides
- Sponsor acknowledgement and logo sticker inside all workbooks
- Opportunity to provide marketing brochure and health related promotional items for display table

Silver Level Sponsor:

- Sponsor acknowledgement and logo placed on all marketing and registration materials
- Sponsor acknowledgement in all press releases and newsletter articles
- Sponsor acknowledgement and logo on all workshop signage and slides
- Opportunity to provide marketing brochure and health related promotional items for display table

Bronze Level Sponsor:

- Sponsor acknowledgement and logo placed on all marketing and registration materials
- Sponsor acknowledgement and logo on all workshop signage and slides
- Opportunity to provide marketing brochure and health related promotional items for display table

Contact:

(your organization here)

Contact Name

Address

Phone Number

Email

Website

*Based on Louisiana CDSMP materials

CDSMP Provider Recruitment Letter Sample

[INSERT ORGANIZATION LOGO
ADDRESS
PHONE NUMBER
EMAIL]

[DATE, 2013]

Dear [Provider's Name]:

The number of people with chronic conditions in our communities continues to grow. These individuals can be overwhelmed with the daily challenges of diet, physical activity and medication considerations. In support people with chronic conditions, the [Organization Name] is offering the “**Living a Healthy Life with a Chronic Condition**” to those in our community with diabetes, high blood pressure, arthritis, heart conditions and other health challenges.

“**Living a Healthy Life with a Chronic Condition**” is an evidence-based program developed by Stanford University. In a series of six weekly sessions, participants will:

- Receive support from trained leaders and other workshop participants.
- Learn practical ways to manage their pain and fatigue.
- Learn about nutrition and exercise choices.
- Understand new treatment choices.
- Learn better ways to communicate with doctors and family members.

We need your support to reach all of those individuals that may benefit from this program. Please consider encouraging your patients to attend this workshop by utilizing the materials enclosed. If you have any questions or concerns in regards to sharing this information with your patients, please contact us at [phone number].

Thank you so much for your assistance. Please let us know if we can assist you in anyway.

We truly appreciate all of your time and effort.

Sincerely,

[Program Coordinator's Name;
Organization Name;
Etc.]

Enc.

CDSMP Provider to Patient Letter Sample

[INSERT ORGANIZATION LOGO
ADDRESS
PHONE NUMBER
EMAIL]

[DATE, 2013]

Dear [Provider's Name]:

The number of people with chronic conditions in our communities continues to grow. These individuals can be overwhelmed with the daily challenges of diet, physical activity and medication considerations. In support people with chronic conditions, the [Organization Name] is offering the “**Living a Healthy Life with a Chronic Condition**” to those in our community with diabetes, high blood pressure, arthritis, heart conditions and other health challenges.

“**Living a Healthy Life with a Chronic Condition**” is an evidence-based program developed by Stanford University. In a series of six weekly sessions, participants will:

- Receive support from trained leaders and other workshop participants.
- Learn practical ways to manage their pain and fatigue.
- Learn about nutrition and exercise choices.
- Understand new treatment choices.
- Learn better ways to communicate with doctors and family members.

We need your support to reach all of those individuals that may benefit from this program. Please consider encouraging your patients to attend this workshop by utilizing the materials enclosed. If you have any questions or concerns in regards to sharing this information with your patients, please contact us at [phone number].

Thank you so much for your assistance. Please let us know if we can assist you in anyway.

We truly appreciate all of your time and effort.

Sincerely,

[Program Coordinator's Name;
Organization Name;
Etc.]

Enc.

Social Media

Social media is being used by more and more organizations. Most of these organizations maintain a website and have considered other social media. Facebook, Twitter, blogs, text messaging, and video sites are all popular areas of social media. Although many of you are already utilizing social media, others may still be determining its usefulness with your market and program and its benefit. Take time to plan your approach to social media, create the content, and listen to those experienced in social media and those responding to your social media. Consider how negative messages and complaints on your social media sites will be addressed, as well as, who is responsible for making this determination. Further decisions of how you will implement and maintain your website and social media should be noted, as well.

■ tools

Social Media Success Kit (https://www.fels.upenn.edu/sites/www.fels.upenn.edu/files/PP3_SocialMedia.pdf)

Social Media Toolkit (http://www.cdc.gov/healthcommunication/ToolsTemplates/SocialMediaToolkit_BM.pdf)

Thou Shalt Tweet! Guide (<http://api.ning.com/files/CsePX8HSY2R5Ealmirobz3-IYcIGOHJWtSpOwD9Eh9WtSHI27KWIVTyj9psnPV1MVB95IHceIxfHE0Iol2vrQse-VWz4HNm/ThouShaltTweetGuideFinal.pdf>)

Funding

Funding

There are costs to offering a program. Staff salaries, materials, marketing, trainings, licensing, and other direct expenses need paid. Establishing the overall cost of the program is necessary for implementation and planning. An annual budget of program expenses to the organization and program expenses for one event are essential pieces to developing the accurate estimates needed. After establishing the cost and value of the program, plans can be developed on how to best use available resources to offer the program and in what capacity, as well as, plans to continue or expand funding for program needs.

Although some organizations make program managers and coordinators responsible for managing and obtaining funds, others do not. If you are not accountable or part of the team that is accountable for the management of the program funds, take time to meet with and work with these individuals to obtain the necessary information to plan the future of the program.

As with all of the other areas of this guide, tools are given to assist in the assessment of current funds and funding sources, as well as, the planning process to maintain and expand funding in the future. Remember to include all of the items the project requires annually, as well as, licensing or insurance or other fees that are not paid out each year. Consider the current resources and those that will be required and/or needed to sustain the program. Within the plan, be accurate and include those funds that are provided as “in-kind” by your organization or another organization such as staff time, fringe benefits, space, office phone, computer, internet service, travel costs and expenses.

After making these assessments and determining a budget, think of the different ways funding can be sustained and/or expanded in support of the program. Current program funds should not be exhausted before other sources are being sought. Consider a variety of diverse sources. Time is required in researching new sources, developing relationships, producing materials and submitting necessary applications and documents. Be creative as this guide considers some of the ways listed below.

- Competitive application and/or local foundation grants
- In-kind support
- Fee-for-service structure
- Sponsorships
- Discounts & Deals
- Organizational fundraiser
- Service Contracts (health plans, worksite)
- Charitable Contributions and others
- Third-party funding

REMEMBER. If all program areas work independently in acquiring and managing funds, it is important to meet together to plan how each program is obtaining funds, where they are obtaining funds, and if they are “asking” – how, who and when they are “asking”.

■ tools

Financial Assessment (Current)

Budget Templates (Organizational & Program)

Funding Development Plan Template

Community Toolbox

(<http://ctb.ku.edu/en/table-of-contents/finances/managing-finances/annual-budget/main>)

CDSMP Sample Budget

NCOA CDSMP Cost Calculator

(<http://www.ncoa.org/improve-health/center-for-healthy-aging/content-library/chronic-disease-1.html>)

NCOA CDSMP Tips to Fund and Sustain Your Health Programs (<http://www.ncoa.org/improve-health/behavioral-health/tips-to-fund-and-sustain-your.html>)

CDSMP Show Me the Money Webinar Slides

(<http://www.ncoa.org/assets/files/pdf/2012-Aging-in-America/ASA-Show-Me-The-Money-2012.pdf>)

Organizational Budget Template

EXPENSES	
Item	Amount
Salaries	
(break down by individuals, title, full-time, part-time)	
Fringe	
Supplies	
Equipment	
Phone/Internet	
Utilities	
Insurance, Benefits, Taxes	
Rent	
Travel	
Postage & Delivery	
Depreciation	
Professional Fees & Licensing	
Printing/Copying	
Other (specify)	
Total Expenses	
INCOME	
Grants	
Government	
Foundations	
Corporations	
Individual contributions	
United Way or federated campaigns	
Fundraising events/products	
Membership income	
In-kind support	
Investment income	
Contracts (Government or other)	
Earned income	
Other (specify)	
Total Income	
DIFFERENCE (Income less Expenses)	

Program Budget Template

(Annual Total Expenses for all programs)

EXPENSES	
Item	Amount
Salaries & Fringe, etc. (<i>% charged to program</i>)	
<i>(break down by individuals, title, full-time, or % of time given to program)</i>	
Office Supplies (<i>% charged to program</i>)	
Phone/Internet (<i>% charged to program</i>)	
Utilities (<i>% charged to program</i>)	
Rent (<i>% charged to program</i>)	
Travel	
Postage & Delivery	
Materials for Program	
Professional Fees & Licensing	
Printing/Copying	
Program Promotion	
Stipends/Travel/Incentives for Volunteers or Speakers	
Outside Evaluation (if needed)	
Program Refreshments	
Venue Rental fee(s)	
Equipment Rental fee(s); (AV, etc.)	
Other fees (Webcasting or other specify)	
Total Expenses	
INCOME	
Grants	
Government	
Foundations	
Corporations	
Individual contributions	
United Way or federated campaigns	
Fundraising events/products	
In-kind support	
Contracts (Government or other)	
Earned income (fee for service)	
Other (specify – third party ?)	
Total Income	
DIFFERENCE (Income less Expenses)	

Program Budget (Example 2)*(Expenses for one program)***May not include all line items below – consider one time costs or annual costs**

EXPENSES	
Item	Amount
Salaries (& Fringe) to do one program <i>(break down by individuals, title, % of time given to program)</i>	
Office Supplies	
Phone/Internet (<i>% charged to program</i>)	
Utilities (<i>% charged to program</i>)	
Rent (<i>% charged to program</i>)	
Travel	
Postage & Delivery	
Materials for Program	
Professional Fees & Licensing (<i>% charged to one program</i>)	
Printing/Copying	
Program Promotion	
Stipends/Travel/Incentives for Volunteers or Speakers	
Outside Evaluation (if needed)	
Program Refreshments	
Venue Rental fee	
Equipment Rental fee (AV, etc.)	
Other fees (Webcasting or other specify)	
Total Expenses	
INCOME	
Grants	
Government	
Foundations	
Corporations	
Individual contributions	
United Way or federated campaigns	
Fundraising events/products	
In-kind support	
Contracts (Government or other)	
Earned income (fee for service)	
Other (specify – third party ?)	
Total Income	
DIFFERENCE (Income less Expenses)	

Funding Development Plan

Goal 1:

SMART Objective:

Funding Type/Source:

Tactic / Strategy	Amount Requested	Response/Deliverables	“Ask” Timeline/Deadline	Staff Responsible	Notes/Follow-up Communication

Goal 2:

SMART Objective:

Funding Type/Source:

Tactic / Strategy	Amount Requested	Response/Deliverables	“Ask” Timeline/Deadline	Staff Responsible	Notes/Follow-up Communication

Goal 3:					
SMART Objective:					
Funding Type/Source:					
Tactic / Strategy	Amount Requested	Response/Deliverables	“Ask” Timeline/Deadline	Staff Responsible	Notes/Follow-up Communication

CDSMP Budget Template

Living Well Budget Template

Item	Quantity	Item amount	Total
License fee (\$500 for 10 workshops/year for 3 years)	1	\$500.00	\$500
<i>Living a Healthy Life</i> book	15	\$15.16	\$227
Relaxation audio CD	1	\$10.00	\$10.00
CD player	1	\$30.00	\$30.00
Flip chart paper, easel and markers	2	\$210.00	\$420.00
Tissue	4	\$3.00	\$12.00
Masking tape	2	\$1.50	\$3.00
Clock or watch with second hand	1	\$15.00	\$15.00
Notepads	5	\$5.29	\$26.45
Box of pens or pencils	5	\$8.00	\$40.00
Box of blank reusable nametags	1	\$26.99	\$26.99
Snacks and/or bottled water per workshop	1	\$150.00	\$150.00
Stipends for lay leaders	2	\$200.00	\$400.00
Salary and benefits for a part or full-time program coordinator position	1	\$30,000.00	\$30,000.00
Meeting space rental	1	\$200.00	\$200.00
Incentives for participants (transportation, child care, gift cards)	15	\$10.00	\$150.00
Leader meetings/in-services	1	\$300.00	\$300.00
			\$32,511

Grants

Grants are funds disbursed by grant makers, often a government department, corporation, foundation or trust, to a recipient, often a nonprofit entity, educational institution, business or an individual.

Seeking grant funding is one way to expand resources. Grants are one of the most approachable sources for many organizations to grasp. There are vast amounts of information on the grant process: where to seek a grant, how to research opportunities, how to write a grant, and other needed information.

Regardless of the type, competitive application or local foundation grant, some form of “grant writing” is usually required. The proposal or application submitted is in response to funding opportunities proposed by the grant makers. Take time to do the necessary homework as you consider grant sources before you begin writing.

- Research grant opportunities.
- Research the funder/foundation.
- Note the requirements and restrictions.
- Verify your organization is a match to the funder's interest.
- Consider who and what was funded in the past and who and what is funded annually.
- Note the amount of typical grant.
- Determine if your organization is able to meet the guidelines and requirements for funding.
- Note the deadline.
- **READ AND FOLLOW THE DIRECTIONS given by the grant maker. Most funders will eliminate all applications that do not follow the directions as required.**

As you begin writing the grant, determine what is needed. Often a grant maker requires an initial “Letter of Intent” (example in Tools). Also, consider the pieces needed to submit an application. A check off list of these sections may be helpful in the writing process. Common application parts include:

- Cover Sheet.
- Proposal Summary.
- Full Proposal Narrative.
- Budget and Budget Justification.
- Additional Documents (Nonprofit tax ID number and IRS Letter, Total Organization Budget, Organizational Chart, Board List, Reference Letters, and others requested).

Many resources are available to assist in researching opportunities. These resources can be found online and in local libraries. A few of these websites are noted in the tools section below. An individual foundation's website can provide information on past grant recipients and more, as well. It may be valuable to contact the grant representative prior to submitting any formal items to note interest and clarity on requirements.

Finally, take into account if you can provide and meet the funder's requirements and present the evaluation and documentation necessary to confirm the successes and challenges in the process at the completion of the grant funding. Plan how the grant will be evaluated prior to submitting your final application. Refer to the program evaluation section above to consider how this can be accomplished.

Tools are listed below to assist in the planning, research and writing of a grant.

■ tools

Grant Work Plan & Timeline Sheet

NCOA Grantee Meeting Action Steps

Sustainability

Nonprofit Works Steps to Building an

Effective Grantseeking Program

Letter of Inquiry Samples

(<http://grantspace.org/Tools/Knowledge-Base/Funding-Research/Proposal-Writing/letters-of-inquiry>)

Cover Letter Samples

(<http://grantspace.org/Tools/Knowledge-Base/Funding-Research/Proposal-Writing/proposal-cover-letters>)

Proposal Samples

(<http://grantspace.org/Tools/Knowledge-Base/Funding-Research/Proposal-Writing/Grant-proposals-for-individual-projects>)

Pharmaceutical Grants Contact List

(http://www.acep.org/uploadedFiles/ACEP/Membership/ACEP_chapters/chapter_services/small_chapter_guide_to_hosting_a_meeting/PharmaceuticalGrantsContactList.pdf)

List of Community Foundations in Indiana

(<http://www.tgci.com/funding-sources/IN/community>)

Show Me the Money Webinar Slides – see above section

Nonprofit Works, Inc. Tools for Grant Writing

(<http://www.nonprofitworks.com/downloads/default.asp>)

Online Grant Basics Course

(<http://foundationcenter.org/getstarted/tutorials/shortcourse/index.html>)

REMEMBER. Many grant makers now require that the organization completes an online application and/or submit the materials required online. Pharmaceutical grants and other entities are those that may only accept requests online.

REMEMBER. Always make a case for support and sustainability by implementing the cost of the program in your messages – note the cost of the program for each participant, return on investment, as well as, quality of life.

Grant Work Plan & Timeline

RESEARCH/HOMEWORK					
Source Name	Contact Information	Application Deadline	Requirements to Submit (geographical, funding interest, population served, funding type)	Staff Responsible	Notes/Follow-up Communication

WRITING AND SUBMIT of Grant					
Source Name	Documentation Needed	Application Pieces to Write	Staff Responsible	Deadline to submit piece	

GRANT COMPLETION, EVALUATION, & REPORT					
Source Name	Contact Information	Report Deadline	Evaluation/Documentation to Submit	Staff Responsible	Notes/Follow-up Communication



National Council on Aging

NCOA CDSME Grantee Meeting: Keys to Scaling and Sustaining CDSME Programs

What actions are you taking? Here's what others are working on:



Effective Leadership

- Create a state-level advisory council or collaborative
- Work to obtain executive level commitment and buy-in
- Integrate efforts across programs and leverage funding from other chronic disease and injury programs; work across programs for referrals

Partnerships

- Expand collaborations with ADRCs
- Make connections with housing facilities, FQHCs, and other community health centers
- Connect with Veterans Administration
- Partner with health care for referrals, as host organizations and implementation sites, for trainers and leaders, and for funding support or reimbursement
- Build relationships with disability programs, employee benefits programs, and worksite wellness programs
- Leverage existing networks and implement new partnerships with "turn-key" organizations to embed programs

- Establish, expand, or improve a partnership with a tribe, minority agency, or other organization that serves hard to reach or other targeted populations
- Other potential partnerships to explore include: Department of Corrections, Department of Labor (especially the Senior Community Service Employment Program), insurance companies, public health agencies, library systems, faith-based organizations, adult literacy programs, parish nurses, group homes, and physician practices

Infrastructure

- Create regional networks for cost-effective program delivery and statewide coverage
- Analyze workshop size and participant retention
- Set criteria to engage competent leaders and master trainers and employ strategies to retain them
- Implement new approaches to increase participant reach and improve retention

NATIONAL COUNCIL ON AGING

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www.NCOA.org ■ www.facebook.com/NCOAging ■ www.twitter.com/NCOAging

Coordinated or Centralized Logistical Processes

- Create a centralized registration process
- Create a centralized referral mechanism
- Try out GIS mapping
- Review existing program implementation and marketing toolkits
- Prepare a quarterly newsletter for sites and partners
- Use a more active referral process
- Identify cross-promotion opportunities with other programs
- Share information on partner websites
- Develop a website for both marketing and connecting master trainer and lay leaders
- Develop new talking points for providers
- Combine menus of CDSME programs
- Undertake a statewide marketing campaign and marketing programs via the internet
- Learn more about offering Better Choices, Better Health (online CDSMP)
- Develop centralized workshop schedule
- Develop referral feedback loop
- Create a program impact report with state and county data

Quality Assurance/Fidelity Monitoring

- Develop or strengthen a quality assurance program, including performance indicators
- Streamline and standardize fidelity monitoring
- Review existing quality improvement tools

Business Planning/Financial Sustainability

- Price your CDSME programs
- Identify opportunities to embed CDSMP within Patient-Centered Medical Homes, Care Transitions, and other Affordable Care Act opportunities
- Explore other opportunities to work with Medicare, Medicaid, and other payers
- Explore reimbursement for DSMP via Medicare’s Diabetes Self-Management Training Benefit
- Write a business plan and/or sustainability plan
- Review existing business plans and toolkits

More than 100 Chronic Disease Self-Management Education (CDSME) grantees and partners from around the country convened in April 2013 in Arlington, Virginia to learn and share strategies around scaling and sustaining CDSME programs. Participants reported forging “new connections with programs across the country,” feeling “newly energized” in their efforts, and coming away with “lots of food for thought—and action.”

NCOA’s Center for Healthy Aging (CHA) is funded by the US Administration on Aging (AoA) as the National Technical Assistance Resource Center for the 22 CDSME state grantees.



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Steps to Building an Effective Grantseeking Program

1. Discuss within your agency the elements of an effective grantseeking program so that everyone involved (or should be involved) understands the requirements for success.
2. Plan the programs and projects for which you will seek grant funding, share and discuss plans within your agency, and, if applicable, incorporate with your agency's strategic plan.
3. Develop a realistic operating budget and use it to determine your funding needs, and the amounts and uses of your grant requests.
4. Review past grants received and those you didn't, pending grants, and grants you are planning to submit. Determine which ones you should re-apply for, and which ones you shouldn't.
5. Research and select appropriate grants and funding opportunities that will allow you to reach your funding goals.
6. Create and maintain a written grantseeking plan and calendar.
7. Approach funding opportunities before applying: introduce yourself, seek a "fit" or "match" with the funder's interests, and request permission to apply.
 - Inquire by phone, e-mail, or a letter of inquiry
 - Send information about your organization (e.g., brochure, annual report, article, references)
 - Invite funders to visit your program, or ask if you can visit them
8. Prepare standard materials before applying: budget, logic model, cover letter, proposal narrative, board list, reference letters, attachments, etc.
9. Complete and submit applications in accordance with your grantseeking plan and calendar.
10. Follow up your grant requests
 - Contact the funder to make sure they received your request
 - Ask them if they understand your request, and what your organization does
 - Offer to provide them with additional information or answer any questions they may have
 - Invite them to visit your site
 - Find out if they have a timeline for making a decision
 - Close by thanking them
11. If your application is approved: thank the funder, discuss grant requirements and expectations with the funder (payments, vouchers, reports, etc.), communicate the grant requirements within your organization, implement methods to track and evaluate the grant, report to the funder, and maintain a positive relationship with the funder.
12. If your grant application is not approved, contact the funder to learn why and if your organization should consider reapplying in the future. Thank the funder for their time and consideration.

Fee-for-service Structure

Establishing a fee for service is often the final scenario for many organizations and programs. It seems many consider this to be a disservice to the participants. It is important to realize that a service cannot be sustained over an extended period of time - if offered for free or below the actual cost over a long period of time. Therefore, a fee schedule must be structured that reflects the actual cost of the program. Tools are noted below that can assist in finding this actual cost of the program. If this amount is divided by average number of participants – cost per individual can be established. This valuable information can be used in developing communications of the value of the program, as well as, with grant writing and other fund development.

After this fee is set, how the cost may vary depending on each participant can then be determined. For participants with low income and/or limited resources might be eligible for sliding scale, payment plans, scholarships, or other assistance. These assistance programs can be established as means to assist in lowering the cost or offering the program for free. The next section will further discuss “Discounts & Deals” options.

■ tools

NCOA CDSMP Cost Calculator

(<http://www.ncoa.org/improve-health/center-for-healthy-aging/content-library/chronic-disease-1.html>)

Discounts & Deals

A discount or “deal” can assist in providing the program to participants for a lower price while establishing the actual cost of the program.

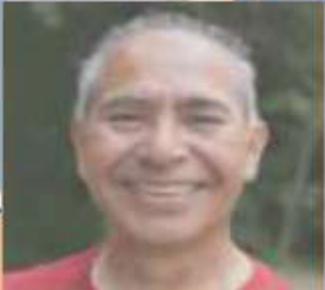
Participation can be encouraged by the use of vouchers, coupons, promotions, and scholarships; such discounts while assuring services are affordable for participants.

Discounts and deals may permit services to be available for no charge to some participants, as well. A mix of funding sources, such as grant funds or private donations may allow an organization to offer discounts and deals. A few examples are provided in the Tools section.

■ tools

CDSMP Voucher

CDSMP Coupon



This Voucher Entitles
to attend the *“Living a Healthy Life with Chronic Conditions”* program for free

Managing a chronic condition is not easy – everyone needs support.
Must attend before: _____
Voucher Value: _____

*Insert your
Logo here*

Put Life Back In Your Life!

CDSMP Coupon Sample



*Insert your
Logo here*

(Insert 1 to 2 month date range)
\$25 off
**Living a Healthy Life
with Chronic Conditions**
Learn to take control of your life

*Call (insert phone number)
for more information &
register for this 6 week program.*

Put Life Back In Your Life!

Donations

Although many programs may be offered for free, a suggested participant donation may be requested to assist with the cost of the program materials, program book, refreshments and other expenses. This request can be a formal letter or spoken invitation. Remember to formally record all donation amounts by individual to include contact information and date and reason for donation. A letter should be sent to serve as a receipt for this donation.

Sponsorships

Sponsorships offer community organizations, businesses and individuals an opportunity to provide funding for a program in return for recognition as a supporter and an occasion to offer limited promotion to the participants.

A program may choose to offer all types of sponsorships, but commonly there are four levels:

- **Platinum**
- **Gold**
- **Silver**
- **Bronze**

Each level offers recognition and select promotional benefits, such as, placement of marketing brochures on a display table, promotional items in goodie bags, logo on registration materials, logo on posters and signage, logo on slides, logo and mention in all press releases as sponsor, ad in newsletter, and others. These levels and the benefits are established by the organization. After an entity decides to be a sponsor, a formal document would be signed. An example of a sponsorship form and letters is provided in the Tools section.

■ tools

[Sponsorship Letter](#)

[Sponsorship Form](#)

CONSIDER. Many different types of organizations and businesses, not just health related entities, may have an interest in supporting people with chronic diseases in the target market you are attracting. Think outside of the box as you establish those entities to approach for sponsorship.



“Put Life Back in Your Life”

We are proud to offer you a wonderful opportunity to sponsor our **Living a Healthy Life with Chronic Conditions** workshop. This Stanford University evidence-based program consists of six weekly 2½ hour classes for people with chronic health concerns, such as heart disease, diabetes, high blood pressure, cancer and others. Participants learn how to manage their health conditions by setting goals and taking action in areas of nutrition, exercise, stress management, relaxation and more.

Sponsors of the **Living a Healthy Life with Chronic Conditions** provide funds toward the operating specific to the six week workshop. Participant workbooks, relaxation CDs, refreshments and marketing materials are just a few of the costs to offer a workshop. Sponsorships opportunities are available to all organizations.

The following are the following four levels:

1. Platinum
2. Gold
3. Silver
4. Bronze

Participants will have an opportunity to view items on a display table each week. Sponsoring organizations are able to place marketing brochures and other promotional health related items on this table to reach participants with their message.

Sponsors may not visit the workshop but may enroll as a participant. No exceptions per Stanford University requirements.

Steps to become a Sponsor

- Sponsor agency and (***your organization here***) will agree on sponsorship level
- Sponsor agency and (***your organization here***) will sign contract of terms. The original contract will be retained at (***your organization here***), all other parties will be provided a copy for their files.
- Payment will be received within 7 days of agreement signing. Sponsorship benefits shall not be provided prior to payment.

Contact:

(***your organization here***)

Contact Name

Address

Phone Number

Email

Website

*Based on Louisiana CDSMP materials



“Put Life Back in Your Life”

Sponsorship Levels

Sponsorship provides:

- 6 week workshop for up to XX participants at XX location
- Participant weekly materials
- XX Participant workbooks
- XX Relaxation CDs
- Marketing materials and outreach time
- Healthy refreshments each week
- **ADD OTHER ITEMS AS NEEDED**

Platinum Level Sponsor:

- Sponsor acknowledgement and logo placed on all marketing and registration materials
- Sponsor acknowledgement in all press releases and newsletter articles
- Sponsor acknowledgement and logo on all workshop signage and slides
- A banner in workshop room during class (Sponsor provides banner)
- Sponsor acknowledgement and logo sticker inside all workbooks and CDs
- Opportunity to provide marketing brochure and health related promotional items for display table

Gold Level Sponsor:

- Sponsor acknowledgement and logo placed on all marketing and registration materials
- Sponsor acknowledgement in all press releases and newsletter articles
- Sponsor acknowledgement and logo on all workshop signage and slides
- Sponsor acknowledgement and logo sticker inside all workbooks
- Opportunity to provide marketing brochure and health related promotional items for display table

Silver Level Sponsor:

- Sponsor acknowledgement and logo placed on all marketing and registration materials
- Sponsor acknowledgement in all press releases and newsletter articles
- Sponsor acknowledgement and logo on all workshop signage and slides
- Opportunity to provide marketing brochure and health related promotional items for display table

Bronze Level Sponsor:

- Sponsor acknowledgement and logo placed on all marketing and registration materials
- Sponsor acknowledgement and logo on all workshop signage and slides
- Opportunity to provide marketing brochure and health related promotional items for display table

Contact:

(your organization here)

Contact Name

Address

Phone Number

Email

Website

*Based on Louisiana CDSMP materials

Service Contracts (health plans, worksite)

Service contracts make a program available to an organization as a benefit to their constituents – employees, patients, customers. The program should stress the value of the program to assist in the organization's efforts to save costs and promote health. Health care organizations, health insurance companies, and employers may be potential entities to approach.

The service contracts could vary depending on the level of involvement and the relationship with the organization. The contract may allow for a sponsor to be charged for the services of the program for a certain number of people or groups to be held at a certain location for the organization's constituents, a program at reduced cost to the participant during work time, or a meeting room and promotion of program. Be creative and consider all of the options available within health care organizations, insurance companies, and employers. The contract would specify terms, reimbursement rates, dates of service, etc.

Consider who you may want to contact to offer your program. Determine what modifications may be needed in your approach to a large employer as opposed to a health insurance provider and how they might be most apt to support the program.

■ tools

Contract Sample

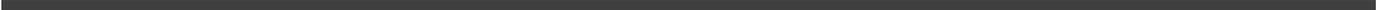
CDSMP Data Sheet

NCOA CDSMP Cost Calculator

(<http://www.ncoa.org/improve-health/center-for-healthy-aging/content-library/chronic-disease-1.html>)

Contract Sample

**[INSERT ORGANIZATION LOGO
ADDRESS
PHONE NUMBER
EMAIL]**



SERVICE CONTRACT SAMPLE

This is a contract entered into by {INSERT YOUR ORGANIZATION NAME} (hereinafter referred to as "the Provider") and {INSERT ORGANIZATION NAME} (hereinafter referred to as "the Client") on this date, {INSERT DATE}.

The Client hereby engages the Provider to provide services described herein under "Scope and Manner of Services." The Provider hereby agrees to provide the Client with such services in exchange for consideration described herein under "Payment for Services Rendered."

Scope and Manner of Services

Services To Be Rendered By Provider: enumerate here each particular task to be performed and its acceptable result, i.e.,

- 1. Provide the "Living a Healthy Life with Chronic Conditions" program in 6 weekly 2 ½ hour sessions at {INSERT LOCATION – INCLUDING ROOM AT LOCATION IF PROVIDED} for up to {INSERT PARTICIPANT MAX AMOUNT} providing all materials, participant books and CDs, etc. This program will be provided between the dates of {INSERT DATES}.

Payment for Services Rendered

The Client shall pay the Provider for services rendered within 30 calendar days of the date on invoice for services rendered from the Provider.

Should the Client fail to pay the Provider the full amount specified in any invoice within 30 calendar days of the invoice's date, a late fee equal to {INSERT \$AMOUNT} shall be added to the amount due.

Applicable Law

This contract shall be governed by the laws of the County of {INSERT COUNTY NAME} in the State of {INSERT STATE NAME} and any applicable Federal law.

Signatures

In witness of their agreement to the terms above, the parties or their authorized agents hereby affix their signatures:

(Printed Name of Client or agent)

(Printed Name of Provider or agent)



Charitable Contributions and others

Many organizations use charitable contributions and/or fundraising methods to assist with program funding. Different types may be considered, such as annual donation campaigns or estate giving programs. Sponsored events like an auction, appreciation luncheon for volunteers, golf tournaments, walks and others may be utilized, as well. In addition to generating revenue, fundraising activities should increase awareness of programs and services. Success stories of past program participants are great to promote, as well.

CONSIDER. In-kind, as defined by the Merriam-Webster dictionary, is “consisting of something (as goods or commodities) other than money”. Always consider those entities that support the program by offering “in-kind” resources: meeting location, volunteer staff, refreshments, printing, advertising space, etc.