# **Sustainability Plan for: (insert initiative name)**

# **Background**

Te Pūtahitanga o Te Waipounamu invests in transformative change to build sustainable whānau capability. Areas of support include; business start-ups, cultural strengthening, education, leadership, fitness and inspiring transformation within communities.

Te Putahitanga o Te Waipounamu is a unique iwi partnership amongst all nine mana whenua iwi of the South Island.

Mission - is to invest in and support thriving whānau

Kaupapa - all whānau are self-determining to realise oranga whānau

*Kia rere, kia pīataata me he kuru auhika*That it may flow freely and shine like precious pounamu

All applications are expected to address, in some way, the aspirations encompassed within the following seven pou:

1. Pou Tahi-Whānau in Te Waipounamu are self-managing
2. Pou Rua-Whānau in Te Waipounamu leading healthier lifestyles
3. Pou Toru-Whānau in Te Waipounamu are participating fully in society
4. Pou Whā-Whānau in Te Waipounamu are confidently participating in te ao Maori
5. Pou Rima-Whānau in Te Waipounamu are economically secure and successfully involved in wealth creation
6. Pou Ono-Whānau in Te Waipounamu are cohesive, resilient and nurturing
7. Pou Whitu-Whānau in Te Waipounamu are responsible stewards of their living and natural environment

# **Purpose**

The purpose of the sustainability plan is to ensure that whānau and their initiatives are supported by Te Pūtahitanga and have the capability and resources to continue developing their initiative once funding has ceased. The sustainability plan will be a key document to be used at the start of the initiative and throughout the entire reporting process. It will be interwoven at each milestone, reporting period and be the source of key information provided by the whānau enterprise coaches, driven by outcomes and results.

# **Objectives**

To systematically measure whānau capability throughout their contract period. To clearly identify:

* Areas of concern;
* How to address those concerns;
* Who will be responsible to address those concerns;
* By when;
* Requirements for a sustainable business model in a changing environment.

# **Delivery**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **PHASE** | **#** | **MILESTONE** | **ISSUE** | **HOW** | **WHO** | **WHEN** | **COMPLETE** |
| On-Execution | 1 | Signing and receipt of invoice | Sustainability planning checklist | Completed by applicant | Whānau member | On application | On application |
| Set-Up | 2 | Progress report 1 | Gaps identified in the checklist | Professional services engaged-Lawyer/Accountant | Accountant | Set-up or as required | Within report period |
| Go-Live | 3 | Progress report 2 | Contract description roadblocks | Coaching required | Whānau member | Fortnightly | Within report period |
| Go-Live | 4 | Progress report 3 | Contract description roadblocks | External stakeholder engagement/coaching required | Whānau member | Fortnightly | Within report period |
| Go-Live | 5 | Progress report 4 | Contract description roadblocks | External stakeholder engagement/coaching required | Whānau member | Fortnightly | Within report period |
| Evaluation |  | Summary | Still unresolved | External analyses | Whānau member | Fortnightly | Close of contract |

# **Appendix 1**

Sustainability Planning Checklist

| **ELEMENT** | **REQUIREMENT** | **CHECK?**  **(Yes/No/NA)** |
| --- | --- | --- |
| **WHÂNAU** | Whānau needs identified |  |
| Whānau hui held |  |
| Whānau surveys undertaken |  |
| Whānau engaged in the initiative for the long-term |  |
| **STAKEHOLDERS** | Who benefits |  |
| Who can help |  |
| What funding streams are available |  |
| Who can advocate on our behalf |  |
| What existing agencies can assist |  |
| **FINANCIAL** | Business entity created |  |
| IRD registered |  |
| GST Registered |  |
| Accountant engaged and annual accounts prepared (including any necessary tax returns) |  |
| Business Plan and Strategy in place |  |
| Budget created |  |
| **LEGAL** | Is all relevant legislation being complied with? (e.g Employment, Health and Safety, Charities Act, etc) |  |
| Are all contracts approved and signed correctly |  |
| Are the terms and conditions of any contract being adhered to |  |
| Do you need to comply with any local authority bylaws etc (such as resource consent) |  |
| **SKILLS & EXPERTISE** | Skills matrix developed |  |
| Training plan created |  |
| Succession planning: Gaps identified and recruitment of key staff/skills undertaken |  |
| **KNOWLEDGE CAPTURE AND SHARING** | Historic information is captured and safely stored with ready access |  |
| Local stakeholders and potential funders identified (e.g. key contacts list) |  |
| Who shares a similar kaupapa to you? |  |
| **VALUE and BENEFIT** | Whānau survey template available |  |
| Performance measured identified and tracked |  |
| **DOCUMENTATION** | Marketing documents available |  |
| Key business processes and policies documented |  |
| **OTHER** |  |  |
|  |  |  |
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