Tools of the Trade

Create the Infrastructure & Perfect Your Program Workbook

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Beta Version

Coffey
CONSULTING

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Create the Infrastructure & Perfect Your Program

...Some of the biggest challenges you face in implementing your REO grant are hiring the right mix of employees and creating a program that resonates with your Statement of Work (SOW), participants, employers, and community.

Welcome to the REO Tools of the Trade: Create the Infrastructure & Perfect Your Program—Workbook – containing interactive tools to help you enhance your planning process. This Workbook is part of a series – REO Tools of the Trade – placing the spotlight on three areas which present some of the greatest challenges in developing and maintaining re-entry programs.

- Build the Foundation
- Create the Infrastructure & Perfect Your Program
- Promote Your Program & Address Sustainability

Create the Infrastructure & Perfect Your Program focuses on the importance of:

- Carefully selecting personnel and a staffing configuration that will be able to deliver on the goals you set in your SOW
- Creating a welcoming environment that fosters participant trust and success
- Sticking to a thoughtful, consistent, and creative planning process
- Learning how to get past the screen with partners that may not initially understand your program's value
- Appreciating the services provided by your local American Job Center (AJC) and how to collaborate with this organization
- Building comprehensive mentorship activities

As with all Workbooks in the series, suggested tasks compel you to "hit the pause button," helping to ensure that what you've created will be successful, culturally competent, and sustainable. You will also see that completion requires collaboration and cooperation among staff and partners, reinforcing the importance of remaining on the same page. Your Workbook also comes with a Resource Guide, supplying data, strategies, helpful terms, and examples.

We wish you the best as you plan and implement your USDOL Re-entry Program (RP) and have the utmost confidence that you will build and sustain a program that resonates with your community.

The Coffey Team

Create the Infrastructure & Perfect Your Program At-a-Glance

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Workbook Completion

Integrate the following worksheets as you launch or re-visit your planning process. You may find that some of the worksheets may or may not be relevant to where you are. Feel free to utilize those which make the most sense.

Key Players

The worksheets have a suggested audience, located in **[brackets]** beneath the title on every page.

- **Leadership Team:** Executive Director of your organization and key personnel.

- **Working Group:** Includes the Leadership Team plus organizations and agencies required in the Funding Opportunity Announcement (FOA) and proposed in your SOW.

Definitions

Personnel Descriptors & Areas of Expertise:

- **Project Managers:** Possess a strong combination of seeing the big picture and setting plans into action, communication capabilities, and business acumen. Project Managers take a program's vision, bringing it to life.

- **Case Managers:** Are adept at working directly with participants – conducting assessments; developing service plans; referring participants to partner services; and counseling them as needs arise – being firm but kind, consistent but flexible, and creative but observant of the rules which govern the program.

- **Job Coaches/Soft Skills Trainer:** Ensure that participants understand that they must go beyond looking for work on the Internet. It takes know-how, persistence, consistency, enthusiasm, creativity, and an understanding of how to communicate with employers. Job coaching and soft skills training go hand-in-hand. Soft skills training provides participants with tools that will help them be effective in the workplace including training on problem solving, time management, business etiquette, leadership and management, and interpersonal and communication skills.

- **Job/Workforce Developers:** Match employer needs with participant skill sets. They have their feet in two worlds – your initiative and the world of employers.

- **Outreach and Marketing Specialists:** Promote your program among employers and the community – ensuring that they associate filling employment needs with your initiative; perform damage control when necessary; and talk to the press and others in the community – helping to make the positive aspects of your program visible to the world.

- **Mentorship Coordinators:** Recruit, screen, train, match, and supervise mentors; collaborate with program staff; assist REO participants and their mentors in developing positive and supportive relationships; consistently monitor customer-mentor matches plan and implement group activities, graduation, and celebration ceremonies; speak in front of groups to recruit volunteer mentors and identify additional program resources; and connect the mentoring component with other program services, such as job training and placement.

- **Management Information Specialists:** Document who's moving in and out of your program; how many are in school and what certifications they are obtaining; who has been hired; who and how many have exited or left your program; and who are "soft exits" versus exits from employment. They also may help you generate an internal record keeping system that helps you stay on track.

- **Administrative Support Specialists:** Answer the phones, greet customers and employers, create presentations, schedule appointments, and set up rooms for workshops and activities.

- **Security Guards:** Patrol, or monitor premises to prevent theft, violence, or infractions of rules; monitor and authorize entrance and departure of employees, participants, and other visitors; write reports of daily activities and irregularities such as equipment or property damage, theft, presence of unauthorized persons, or unusual occurrences; and call police or fire departments in cases of emergency, such as fire or presence of unauthorized visitors.

- **Stages of Program Enhancement**

The Planning Stage:
- Review your SOW and other related materials
- If you've not done so already, initiate a series of planning retreats
- Hire key staff members
- Create a service delivery model

Service Delivery On-the-Ground:
- Conduct a comprehensive assessment
- Craft formal plans
- Refine the plans and access resources
- Establish follow-up strategies and procedures

Recruitment & Engagement:
- Partnership development
- American Job Center interfacing
- Improving mentorship activities
- Participant recruitment
- Employer recruitment

Creating Position Descriptions
[Leadership Team]

Based on your SOW, confirm required skill sets and responsibilities tied to positions. Remember that it's recommended that hiring occurs within the first three months of award. Feel free to make multiple copies of this worksheet.

Brainstorm position descriptions for each of your key roles. Include:

- Job Title
- Reporting Sequence
- Task Descriptions
- Qualifications

If you are not familiar with creating position descriptions:

1. Find samples on the U.S. Department of Labor's Bureau of Labor Statistics Occupational Job Descriptions (http://www.bls.gov/ocs/ocsjobde.htm); O*NET Online (https://www.onetonline.org/); and CareerOneStop.org's Job Description Writer (https://www.careeronestop.org/businesscenter/jdw/gettingstarted.aspx).

2. Adapt these descriptions, based on your program's requirements.

3. Verify responsibilities with your Federal Project Officer (FPO) or REO Coach.

Job Title

Reporting Sequence

Task Descriptions
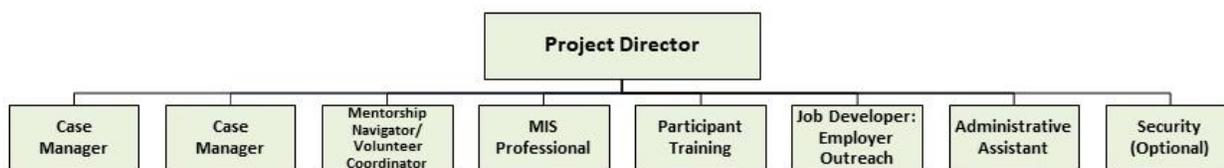
Qualifications

Next Steps

Your Staff Organizational Chart (Community-based Organization Grantees) [Leadership Team]

Think about how you've structured your personnel. Is there sufficient coverage in all areas as defined in your Statement of Work (SOW)? Are there areas that require more attention? If so, what steps will you take to mitigate the challenge(s)?

This exercise provides your Leadership Team with opportunities to confirm whether your structure is working for you.

As a group:

1. List all of the positions and who reports to whom.

2. Draw your organizational chart and compare it to what was presented in your SOW. Here's an example of a community-based organization (CBO) staffing chart upon which to base your drawing.

3. Confirm the advantages and disadvantages of structuring your staff the way it is currently organized.

Advantages	Disadvantages

4. Determine if adjustments need to be made to the staffing structure based on discussion.

5. *Verify how and when you will make those adjustments.

*Collaborate with your FPO and Coach if staffing configurations need to change.

Your Staff Organizational Chart (Intermediary Grantees) [Leadership Team]

Think about how your sub-grantees and you have structured personnel. Is there sufficient coverage in all areas as defined in your Statement of Work (SOW)? Are there areas that require more attention? If so, what steps will you take to mitigate the challenge(s)?

This exercise provides your Leadership Team with opportunities to confirm whether your structure is working for you.

As a group:

1. List all of the positions and who reports to whom – including your sub-grantees.

2. Draw your organizational chart and compare it to what was presented in your SOW.

   Here's a sample of an Intermediary Grantee organizational chart upon which to base your drawing.
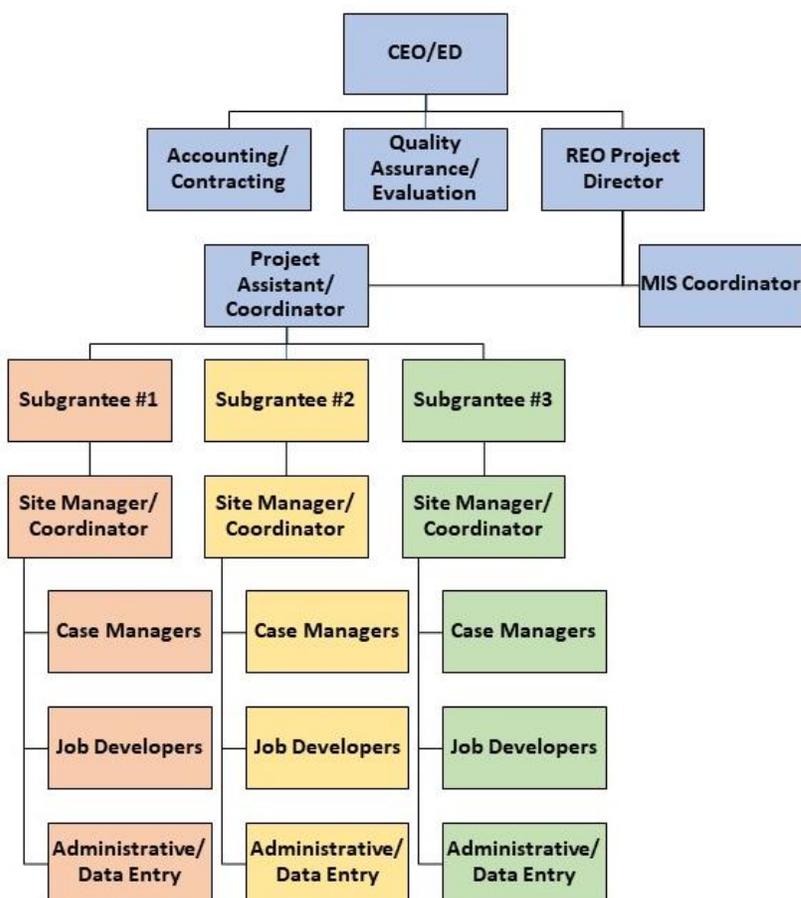
3. Confirm the advantages and disadvantages of structuring your staff the way it is currently organized.

Advantages	Disadvantages

4. Determine if adjustments need to be made to the staffing structure based on discussion.

5. *Verify how and when you will make those adjustments.

*Collaborate with your FPO and Coach if staffing configurations need to change.

Building Staff Capacity
[Leadership Team]

Creating the right mix of staff is truly an art. You may, for example, have hired individuals who possess strong workforce development expertise but lack the background in working with justice-involved men, women, and youth and have little exposure to high poverty/high crime communities. The reverse may also be true. Brainstorm community-specific ideas on how you will address these challenges. Examples are provided to get you started.

Staff members who lack experience working with justice-involved individuals	Staff members who are comfortable working with justice-involved individuals but lack workforce development skillsets
Set up site visits to local correctional institution as part of the final interview process.	Have candidates shadow selected staff members for a ½-day period as part of the final interview process. Expose candidates to the wide range of responsibilities which are inherent to your program's success.
Have these candidates shadow your staff members during meetings with potential participants.	Collaborate with your community partners on participating in the interviews so they can provide feedback on candidates' abilities to be comfortable working in an American Job Center, as well as in high poverty/high crime communities.

Your Office Space
[Leadership Team]

1. Write your program's goals and objectives below:

2. Are these goals and objectives reflected in the look and feel of your office? (Check the appropriate response)
    ☐ Yes
    ☐ No
    ☐ Unsure

    If you answered, "No or Unsure," what elements are missing? Identify the adjustments that can be made immediately versus those that are on your long-term wish list.

Immediate Changes	Long-Term Wish List

3. Are you sharing space with another organization or program?
   ☐ Yes
   ☐ No

   If you answered, "Yes," do you share resources? And if so, confirm whether you are:
   ☐ Satisfied with the arrangements
   ☐ Dissatisfied – more can be done to take advantage of the collaboration (name potential improvements below)

4. If you are an Intermediary Grantee, what features are *required* at service locations?

5. Do all of your locations share a similar brand?
   ☐ Yes
   ☐ No
   ☐ Unsure

   If you answered, "No or Unsure," what elements are missing? Identify the adjustments that can be made immediately versus those that are on your long-term wish list.

Immediate Changes	Long-Term Wish List

Ready…Set…Wait!
Part 1: The Planning Stage
[Leadership Team]

The following questions address different components of the planning and implementation process. Great for planning retreats, the themes below can help you build productive agendas throughout the life of your project. Your end result will be a better understanding of where you are and the actions needed to achieve program success. This exercise is divided into two parts: Part 1: The Planning Stage and Part 2: Service Delivery on the Ground.

You are now completing Part 1: The Planning Stage. Answer the questions in the boxes on your left. Confirm where you are now in the middle box. In the third box, determine if changes need to be made based on your project's vision and objectives.

Keep Your Promises

	Where are you now?	Are adjustments needed?
What commitments did your organization convey in your SOW?		
Are your strategies in alignment with your grant requirements?		

Plan Retreats

As you know, convening retreats is a great way to set the stage for project implementation. Sometimes, however, retreats may not be possible. Define your organization's planning process below:

	Where are you now?	Are adjustments needed?
Do you have a planning process that you're happy with?		
How are tasks completed?		
Who is involved?		
What have you accomplished thus far?		

Hire Key Staff

	Where are you now?	Are adjustments needed?
What staff positions have you filled? (Check all that apply) ☐ Project Manager ☐ Case Manager(s) ☐ Job Coach(es)/ Soft Skills Trainer(s) ☐ Outreach and Marketing Specialist(s) ☐ Mentorship Coordinator(s) ☐ Management Information Specialist(s) ☐ Administrative Support ☐ Security ☐ Other_____		
Describe your staff orientation process: ▪ What does your orientation consist of?		
▪ When does it occur?		
▪ Who conducts orientation activities?		
▪ How do you evaluate its effectiveness?		
▪ Do you have mentors who can guide new staff members?		
▪ Are there mechanisms in place to alert staff of programmatic and/or systemic changes that could impact project performance?		
If you're an Intermediary Grantee, describe how your sub-grantees orient their new staff members: ▪ How is consistent messaging across sub-grantees achieved?		

	Where are you now?	Are adjustments needed?
▪ Are there orientation components that are common across sub-grantees?		
▪ What actions does an Intermediary Grantee take to ensure consistency across sub-grantees?		

Secure Supportive Services

	Where are you now?	Are adjustments needed?
What support services are critical to your efforts?		
What entities provide the services?		
Are your Memoranda of Understanding (MOUs) in place?		
Are more partners needed? If so, what strategies will you employ to enlist the assistance of additional partners?		

Create a Service Delivery Model

Check out the following framework and fill in the blanks. Compare your model against the one found in the Create the Infrastructure & Perfect Your Program—Resource Guide, page 25. Please add the following elements to each box:

- Who will be responsible for task completion

- When task development should begin

Feel free to add more boxes if you need them. Consider drawing the model first!

1-

2-

3-

4-

5-

6-

7-

8-

9-

10-

11-

12-

For Intermediary Grantees…

If you're an Intermediary Grantee, is there a service delivery model with consistent elements across sub-grantees? If so:

1. Name the elements that are common across all sub-grantees

2. Create a service delivery model similar to the one above

3. Confirm who will be responsible for task completion

4. Determine when task development should begin
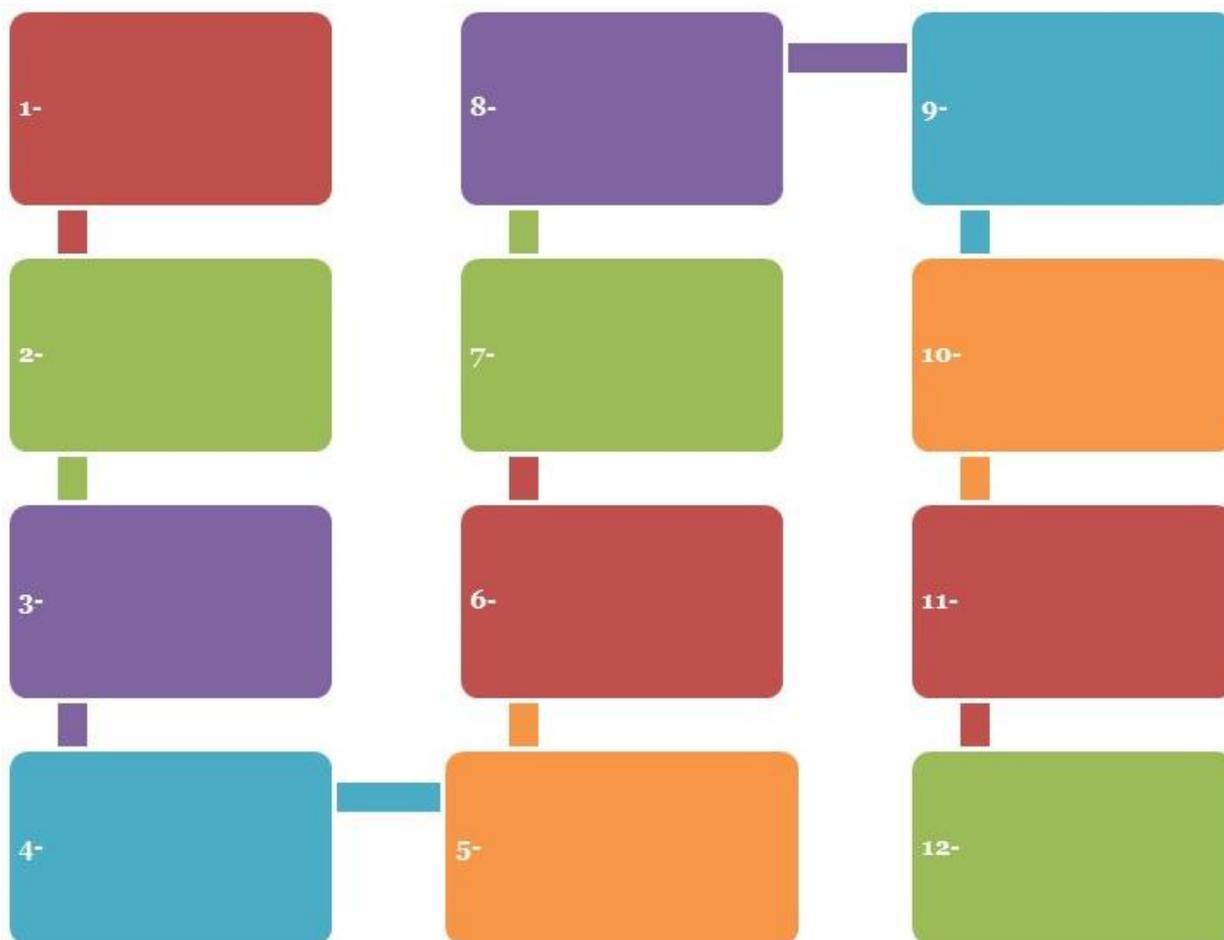
Ready…Set…Wait!
Part 2: Service Delivery on the Ground
[Leadership Team]

The following questions address different components of the implementation process. The themes can help you build productive agendas throughout the life of your project. Your end result will be a better understanding of where you are and the actions needed to achieve program success.

You are now completing Part 2: Service Delivery on the Ground. Answer the questions in the boxes on your left. Confirm where you are now in the middle box. In the third box, determine if changes need to be made based on your project's vision and objectives.

Conduct Comprehensive Assessments & Provide Training

	Where are you now?	Are adjustments needed?
What does your SOW say about participant assessment and training activities?		
List your assessment tools		
Does your program include Career Pathways and Ladders to Success?		
Do training activities include: (check all that apply) ☐ Hands-on ☐ Apprenticeship/OJT opportunities ☐ Career Fairs ☐ Post-follow-up services ☐ Supportive services (and ways to navigate the system)		
Who are your training partners? List the training they provide next to their names.		
Do you need to recruit additional training partners?		
What wrap-around services are critical to your efforts?		

	Where are you now?	Are adjustments needed?
What strategies will you employ to enlist the assistance of some of potential partners?		

Craft Formal Plans

	Where are you now?	Are adjustments needed?
How are participant plans crafted and refined?		
What mechanisms are in place to ensure that plans are regularly updated?		
What does your SOW say about participant follow-up and retention? Do they include (check all that apply): ☐ Case management ☐ Mentoring ☐ Supportive services ☐ Other _____		

Adhere to MIS Requirements

	Where are you now?	Are adjustments needed?
Brainstorm strategies that will help ensure continuous and consistent data collection. Are your strategies: ▪ Possible with your program's staffing configuration and timing?		
▪ Not currently feasible but possible in the future?		
▪ Not applicable and should be shelved for the future?		
What steps have you taken to track participant success? (circle the appropriate response) ▪ We have a case management system in place that's working.		

	Where are you now?	**Are adjustments needed?**
▪ We've started to collect relevant information from our participants.		
▪ We are in need of creating a system that works.		
Define your participant follow-up and program retention activities.		
How does the data found in your case management system intersect with follow-up and retention activities?		
If your case management system needs improvements, what areas should you focus on? Have you sought assistance from your FPO or Coach?		

Collaboration 1-2-3:
Relationship Building with Your American Job Center
[Leadership Team]

One of your most valuable and important partners is your local American Job Center (AJC). And while this is a required partnership, sometimes relationship building activities are needed to solidify the connections. Grantees and AJCs bring much strength to the table where ultimately, your participants – justice-involved individuals and others – can benefit from your ability to effectively collaborate. This exercise is designed to help both of you identify your greatest strengths and confirm how best to work together.

SUGGESTED STRATEGY: Optimally, within two months after award, set up a series of meetings with the leadership of your local AJC. We recommend that the exercise, which is designed to take place over a period of time – minimally three meetings (1-2-3) and on-going after that – involves the grantee (and sub-grantees if applicable) and AJC Executive Directors. You may want to ask your FPO or Coach to virtually participate in the initial meetings, particularly if you are new to re-entry programs and are unfamiliar with the U.S. Department of Labor's AJC system. Also consider including the management information staff in subsequent meetings if/when the subject shifts to data collection.

Meeting 1 – Establish a Baseline

On a flipchart or whiteboard describe the AJC and grantee:

1. Mission
2. Suite of services and the data you are required to collect
3. Job placement goals
4. Staffing roles and who is responsible for what tasks
5. Participants, employers, and partners

You may want to chart out the information like this:

American Job Center	REO Grantee
Mission:	**Mission:**
Suite of Services:	**Suite of Services:**
Job Placement Goals:	**Job Placement Goals:**
Staffing Roles:	**Staffing Roles:**
Participants:	**Participants:**

6. Underline the similarities and draft them out again for your teams to see.

Meeting 2 – Programmatic Intersections

This meeting could involve your Executive Directors, key staff members, and your IT managers.

On a flipchart or whiteboard:

1. Review Meeting 1 findings. Confirm the similarities in your mission, services, job placement goals, staffing roles, and participant base.

2. Brainstorm ideas on how you can work together. What services can you provide for the American Job Center and what can the AJC do for you in return?

3. Draw your respective service delivery models. Is it possible that you may end up sharing participants based on your findings?

4. Looking at your service delivery models, discuss whether there are points along the way where transferring participants from one program to the other makes sense. If so, what paperwork is needed to make that transfer?

5. Confirm whether it's possible for participants to receive services from an AJC *and* a RP grantee (and/or sub-grantees) at the same time. If so, how can you make this happen, and what agency will ultimately be responsible for tracking participant progress?

6. Review the Management Information System (MIS) coding that needs to be in place so that both entities get credit for working with specified participants.

7. Affirm how you will formalize the solutions you've discussed. Confirm who will draft the solutions.

Meeting 3 – Come to Consensus

In this meeting, confirm:

1. Are you in agreement on the drafted solutions? If so, are you ready to formalize your agreement via a Memorandum of Understanding (MOU)? If not, what adjustments need to be made?

2. Who among your two staffs will be responsible for managing your collaboration?

3. Once the MOU is signed, how often should you meet?

4. What easy steps can you make to ensure that lines of communication remain open, even when you're too busy to meet?

Partner Recruitment Brainstorm
[Leadership Team]

Fill in the chart below:

1. Confirm program goals
2. Connect these goals to strategies and activities
3. Categorize the organizations providing services. Are there areas that are missing support? If so, what entities in your community can address them?

HINT: Look at your MOUs and letters of commitment as starting points.

| Goals | Strategies | Activities | Who Provides These Services? | | Services Provided | Point-of-Contact |
			Our Org.	Partners		

When You Can't Get Past the Screen – New Partnership Development [Leadership Team]

Picture this familiar scenario. You've done a great job collaborating with the partners mentioned in your SOW, and you're well on your way to solidifying those relationships. Since award however, you've realized that there are areas that require additional community involvement. Your organization has identified new partners and has attempted to make contact. Numerous emails have been sent, and the customary follow-up phone calls have occurred. To your dismay, you find that you're getting little to no response.

Answering the following questions may help you address reluctant or non-responsive, new partners, helping you to "get past the screen."

HAVE YOU:

1. Visited the website of your designated partner(s) and made a list of all employees?

   ☐ Yes
   ☐ No

2. Confirmed whether anyone on your staff or anyone connected with your staff knows someone who works at or with this organization? Rest assured, somebody knows somebody who knows somebody, and that's what you want to go for.

   ☐ Yes
   ☐ No

3. Set up a meeting to pitch your program to the individual(s) you know? They may not be the decision makers, but you'll be that much closer to winning over the organization.

   ☐ Yes
   ☐ No

4. Reached out to other entities in your community that serve a similar function to the organization(s) you are trying to engage?

   ☐ Yes
   ☐ No

5. Included your FPO or Coach in helping you address this challenge? He or she may have connections that you can take advantage of!

   ☐ Yes
   ☐ No

Based on your answers above, what steps will you take to "get past the screen?"

If in spite of your efforts, you are *still* unsuccessful, don't be disheartened. It just means that you haven't found the key that unlocks the door, and/or the timing isn't quite right. As such, are interim steps required at this time? If so, what are they? If not, when will this particular partnership development activity be resumed?

Mentorship Planning Chart
[Working Group]

Mentorships may or may not be required by your grant. If they are, this worksheet will help you either solidify your activities or affirm that you are on the right track.

1. We think that our mentoring program helps to reduce recidivism.
   - ☐ True
   - ☐ False

   If you answered, "True," describe how your activities achieve this goal.

   If you answered, "False," describe what is realistically doable to help you reach this goal.

2. On a scale of 1-10, 10 being the most challenging, rate the following barriers your participants face in successfully securing and maintaining employment:

   Education
   - ☐ Lack of basic skills such as reading and writing
   - ☐ Need for specialized training
   - ☐ Other _____

   Employment
   - ☐ Lack of skills that match current labor market needs
   - ☐ Interest in creating a home-based business but don't know how to start
   - ☐ Poor presentation skills (resume, clothing, interviewing skills, etc.)
   - ☐ Other _____

   Substance abuse and mental health
   - ☐ Mental health and substance abuse treatment
   - ☐ Mental health and substance abuse recovery services
   - ☐ Other _____

   Health
   - ☐ Managing multiple chronic conditions
   - ☐ Other health concerns (write them here)
   - ☐ Other _____

   Housing
   - ☐ Finding and securing housing
   - ☐ Other _____

Balancing family with work life
- ☐ Childcare
- ☐ Transportation
- ☐ Other _____

Legal
- ☐ Additional warrants
- ☐ Obtaining legal documents
- ☐ Other _____

3. Review the list above, and brainstorm organizations that are or could provide mentors to your participants. Then identify how their participation in your program can help reduce participant recidivism.

Area of Need	Organization & Point-of-Contact	How can their participation help reduce participant recidivism?

4. As a group, affirm recruitment, screening, and customer matching strategies.

5. Discuss mentor/participant relationship guidelines and develop a list of no more than 10 that will govern your program.

6. Confirm how you will train and retain your mentors.

7. Confirm how you will evaluate your efforts.

8. Affirm next steps.

Participant Recruitment & Engagement Brainstorm [Leadership Team]

Participant recruitment is critical to your program's success. As such, it's important to spend time identifying how this process works in your community.

Participant Recruitment

1. We recruit participants from the following sources (list them in the chart below):

2. Think about additional sources that have previously been untapped. Place this information, along with the traditional sources in the chart below.

Participant Recruitment Source	Point-of-Contact	Phone Number and Email Address	Priority (Note Which Entity You Should Contact First)

Participant Engagement

3. We have built-in incentives to keep our participants engaged.
   - ☐ True
   - ☐ False
   - ☐ Unsure

   If you answered, "False" or "Unsure," what strategies are missing? Identify the adjustments that can be made immediately versus those that are on your long-term wish list.

Immediate Changes	Long-Term Wish List

Employer Engagement Strategy Development [Leadership Team]

Employer engagement is an important skill that your staff will be developing and perfecting throughout the life of your project and beyond. Their success at growing your employer base depends on establishing a strong foundation. Completing the following worksheets will help them do so.

1. Employer Prospecting Plan
2. Matching Employers with Participant Skill Sets
3. Employer Triage

1. Employer Prospecting Plan:

Complete the following chart, based on your community's labor market data.

	Industry	Entry-level Job	Mid-level Job	Upper-level Job
Major Industries in Your Community				

	Name	Location	Point-of-Contact	Lead Person
Key Employers in the Area				
Larger Employers				
Key Employer Intermediaries				
Geographic Areas with High Concentration of Employers for Canvassing				

2. Matching Employers with Participant Skill Sets:

Complete the chart below by listing your participants' major skill sets and identify employers that could utilize these skill sets based on your Prospecting Plan above. Be sure to add more rows if you need them.

Participant Skill Sets	Potential Employers	Point-of-Contact	Priority (Note Which Employer You Should Contact First)

3. Employer Triage:

Consider the employers with whom you work and how you keep track of their preferences. Indeed, keeping track of employer "likes and dislikes" will save your staff time and energy. Which employers have high potential versus those who should be left alone? Which ones are "warm" possibilities? Use the form below to help your staff "triage" employer contacts based on what you've experienced on the ground.

Employer	Date of Last Placement	Placement Job Title	Potential Placements for this Position	Potential New Placement Types	Other Partnership Opportunities	Outreach Schedule	Overall Rank: (HOT, WARM, COOL, or COLD)

HOT = ≥ 4 Placements/Year with High Potential for Additional Placements

WARM = 2 – 4 Placements/Year with Additional Placement Potential

COOL = 1 Placement in Past Year with Some Potential

COLD = No Placements in Last Year with Little Potential

Congratulations on completing the Create the Infrastructure & Perfect Your Program—Workbook! Don't forget that you have a Resource Guide that goes into more detail about the issues addressed here.

Check out the other parts of our series – REO Tools of the Trade!

- Build the Foundation
- Promote Your Program & Address Sustainability

> While your program is launched and strategies are in place, NEVER assume that you're done! Keep your expectations realistic. As your participant base changes, so too must your program. Be ready to modify your activities within the context of your grant as needs appear.
>
> Stick with it! The work that you do is essential. You are making a difference in people's lives and contributing to your community's vibrancy, health, and sustainability.