



Tools of the Trade

Create the Infrastructure & Perfect Your Program YOUR STAFF Checklist Intermediary Grantees September 2018 – Beta Version

Welcome to the Create the Infrastructure & Perfect Your Program Checklist – part of the Coffey Consulting’s Tools of the Trade – Resource Guides and Workbooks to help you hit the “pause button” as you plan and implement your program. Completing this checklist will help:

- Confirm your program’s missing pieces
- Determine how best your Coach can assist you in achieving goals and objectives
- Verify the Resource Guide and Workbook pages which are most relevant to your needs

As an Intermediary Grantee, you have the dual responsibility of evaluating your program’s progress, as well as your sub-grantees’ ability to deliver on their promises. As such, two checklists are provided.

Your leadership team can fill out the forms or you can have your staff members complete and compare responses. The second approach provides opportunities to consider consistent and inconsistent beliefs and practices among staff members, setting the stage to get everyone on the same page. Either way, you may want to consider using this checklist after about a month into your planning phase.

Answer the following questions as an Intermediary Grantee, evaluating your own program’s progress.

Assemble Your Team

1. Is your staffing in place?

- Yes
- No
- Unsure

2. List your staffing configuration here:

Are there any positions that remain unfilled?

- Yes
- No
- Unsure

Are roles and responsibilities clearly defined?

- Yes
- No
- Unsure

3. Based on where you are right now in the planning and implementation process, is your current staffing configuration working?

- Yes
- No
- Unsure

4. Do you do have regularly-scheduled weekly, bi-weekly, or monthly staff meetings to assess your program's progress?

- Yes
- No
- Unsure

5. Do you have mechanisms in place for staff input on meeting agendas?

- Yes
- No
- Unsure

6. Is staff training (check all that apply):

- Consistently conducted as new employees come on board? ___yes ___no ___unsure
- Ongoing? ___yes ___no ___unsure
- Include activities for planned professional development? ___yes ___no ___unsure

Your Facility

1. In regards to your office space (check all that apply):

- Our office space is meeting our needs. ___yes ___no ___unsure
- Our office provides for private space for one-on-one sessions with participants. ___yes ___no ___unsure
- We have a classroom where we do our training. ___yes ___no ___unsure
- We have a resource room. ___yes ___no ___unsure

2. If you have multiple locations, is there commonality across all offices?

- Yes
- No
- Unsure

Program Design to Action – The Planning Stage

1. Define your program’s components below:

2. Is your program gender- and/or age-specific?

- Yes
- No
- Unsure

3. Is your planning and implementation process succinct, predictable, and based on your Statement of Work (SOW)?

- Yes
- No
- Unsure

4. Describe how are you tracking your sub-grantees’ progress.

Are you satisfied with these strategies?

- Yes
- No
- Unsure

5. Do you have your Management Information System (MIS) in place?

- Yes
- No
- Unsure

Strategies On-the-Ground

1. Does your service delivery model include concrete milestones and steps on how to get there?

- Yes
- No
- Unsure

2. Is the technical assistance you provide to your sub-grantees evidence-based, community-specific, and consistently offered and delivered?

- Yes
- No
- Unsure

3. Does the technical assistance you’re offering to your sub-grantees resonate with your SOW?

- Yes
- No
- Unsure

Are there programmatic areas that are missing?

- Yes
- No
- Unsure

4. Do you meet with your sub-grantees regularly?

- Yes
- No
- Unsure

What are the typical ways you meet with them (check all that apply)?

- Face-to-face
- Phone
- Facetime or Skype
- Email
- All of the above

How often do you meet with them (check all that apply)?

- Daily
- Weekly
- Monthly
- As-needed

5. Do you have relationships with your American Job Center(s)?

- Yes
- No
- Unsure

If you answered, “yes,” are those relationships open, consistent, and successful, and are services clearly delineated?

- Yes
- No
- Unsure

Thank you for completing the Create the Infrastructure & Perfect Your Program Checklist. We hope that this experience provides opportunities to help you confirm your progress. Share results with your Coach to confirm how the Tools of the Trade: Create the Infrastructure & Perfect Your Program—Resource Guide and Workbook can help you.



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Create the Infrastructure & Perfect Your Program SUB-GRANTEE Checklist Intermediary Grantees September 2018 – Beta Version

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- Confirm your program’s missing pieces
- Determine how best your Coach can assist you in achieving goals and objectives
- Verify the Resource Guide and Workbook pages which are most relevant to your needs

As an Intermediary Grantee, you have the dual responsibility of evaluating your program’s progress, as well as your sub-grantees’ ability to deliver on their promises. As such, two checklists are provided.

Your leadership team can fill out the forms or you can have your staff members complete and compare responses. The second approach provides opportunities to consider consistent and inconsistent beliefs and practices among staff members, setting the stage to get everyone on the same page. Either way, you may want to consider using this checklist after about a month into your planning phase.

Answer the following questions as the entity which tracks the progress of your sub-grantees.

Assemble Your Team

1. Are each of your sub-grantees fully staffed?

- Yes
- No
- Unsure

Are there any positions that remain unfilled?

- Yes
- No
- Unsure

2. Are any sub-grantee staffing positions mandated by time and/or position?

- Yes
- No
- Unsure

Which positions are mandated?

3. In your opinion, are sub-grantees' staffing roles and responsibilities clearly defined?

- Yes
- No
- Unsure

4. Based on where your sub-grantees are right now in the planning and implementation process, are their current staffing configurations working?

- Yes
- No
- Unsure

5. Are your sub-grantees consistently trained about the connection between their work and your role?

- Yes
- No
- Unsure

6. Is sub-grantee staff training (check all that apply):

- Consistently conducted as new employees come on board? ___yes ___no ___unsure
- Ongoing? ___yes ___no ___unsure
- Include activities for planned professional development? ___yes ___no ___unsure

Facilities

1. Have you reviewed the office locations that participants will be served at?

- Yes
- No

2. In regards to sub-grantees' offices (check all that apply):

- Are the spaces and locations meeting participant and employer needs? ___yes ___no ___unsure
- Do the offices include private spaces for one-on-one sessions with participants? ___yes ___no ___unsure
- Are there classrooms where training takes place? ___yes ___no ___unsure
- Are their resource rooms? ___yes ___no ___unsure

3. Are there commonalities across all sub-grantee offices?

- Yes
- No
- Unsure

4. Are sub-grantees branding their activities as part of your own?

- Yes
- No
- Unsure

Program Design to Action – The Planning Stage

1. Define each of your sub-grantee’s program components below:

2. Are their programs gender- and/or age-specific?

- Yes
- No
- Unsure

3. Are their planning and implementation processes succinct, predictable, and based on their SOWs?

- Yes
- No
- Unsure

4. Are Management Information Systems (MIS) in-place?

- Yes
- No
- Unsure

5. Are record-keeping systems being consistently followed among all sub-grantees?

- Yes
- No
- Unsure

Strategy Delivery On-the-Ground

1. Do your sub-grantees’ service delivery models include concrete milestones and steps on how to get there?

- Yes
- No
- Unsure

2. Do your sub-grantees have case management systems in place?

- Yes
- No
- Unsure

Are they consistently followed by those who meet with participants?

- Yes
- No
- Unsure

3. Are participant assessment strategies in place across all or some sub-grantees (circle “all” or “some”)?

- Yes
- No
- Unsure

4. Are training options available across all or some sub-grantees (circle “all” or “some”)?

- Yes
- No
- Unsure

5. Based on sub-grantee assessment, training, and job placement experiences thus far: Does what they’re offering resonate with their original proposals?

- Yes
- No
- Unsure

Are there programmatic areas that are missing?

- Yes
- No
- Unsure

6. Are sub-grantee certifications and other program elements based on labor market data, as well as community and employer needs?

- Yes
- No
- Unsure

7. Do sub-grantees have supportive services in place?

- Yes
- No
- Unsure

8. Do sub-grantees have mechanisms in place with their partners on assisting them with tracking participant progress, pre-, during, and post-program participation?

- Yes
- No
- Unsure

9. Are sub-grantees' relationships with their American Job Centers open, consistent, and successful, and are services clearly delineated?

- Yes
- No
- Unsure

10. Are mentorships part of your sub-grantees' programs?

- Yes
- No
- Unsure

If so, are activities solidified?

- Yes
- No
- Unsure

Are mentors being consistently trained?

- Yes
- No
- Unsure

Is their progress sufficiently tracked?

- Yes
- No
- Unsure

11. Are sub-grantee POST-PROGRAM completion/follow-up services in place?

- Yes
- No
- Unsure

12. Are sub-grantees tracking participants' progress after they've completed your program?

- Yes
- No
- Unsure

Recruitment & Engagement

1. Do sub-grantees have targeted participant and employer recruitment strategies in place?

- Yes
- No
- Unsure

- 2. Are sub-grantees meeting their job seeker and employer recruitment goals?**
 - Yes
 - No
 - Unsure

- 3. Do your sub-grantees need more than the newly-prescribed time periods to enroll their participants? If so, optimally, how much more time do they need?**
 - Yes
 - No
 - Unsure

- 4. Do your sub-grantees have incentives in-place to keep participants and employers engaged?**
 - Yes
 - No
 - Unsure

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