



## Tools of the Trade

### Create the Infrastructure & Perfect Your Program—Checklist 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

There are lots of ways to use this form. Your leadership team can fill it out or you can have your core staff members complete and then 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.

### 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. Is your Management Information System (MIS) in place?**

- Yes
- No
- Unsure

## **Service Delivery On-the-Ground**

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

- Yes
- No
- Unsure

**2. Do you have a case management system in place?**

- Yes
- No
- Unsure

**Is it consistently followed by those who meet with participants?**

- Yes
- No
- Unsure

**3. Do you have participant assessment strategies in place?**

- Yes
- No
- Unsure

**4. Are participant training options available?**

- Yes
- No
- Unsure

**5. Based on your assessment, training, and job placement experiences thus far: Does what you're offering resonate with your SOW?**

- Yes
- No
- Unsure

**Are there programmatic areas that are missing?**

- Yes
- No
- Unsure

- 6. Are certifications and other program elements based on labor market data, as well as your community and employer needs?**
- Yes
  - No
  - Unsure
- 7. Are there supportive services in place?**
- Yes
  - No
  - Unsure
- 8. Do you have mechanisms in place with your partners on assisting you with tracking your participants' progress, pre-, during, and post-program participation?**
- Yes
  - No
  - Unsure
- 9. Is your relationship with your American Job Center(s) open, consistent, and successful, and are services clearly delineated?**
- Yes
  - No
  - Unsure
- 10. Are mentorships part of your grant?**
- Yes
  - No
  - Unsure
- If so, are activities solidified?**
- Yes
  - No
  - Unsure
- 11. Are POST-PROGRAM completion/follow-up services in place?**
- Yes
  - No
  - Unsure
- 12. Are you tracking participants' progress after they've completed your program?**
- Yes
  - No
  - Unsure

## **Recruitment & Engagement**

- 1. Do you have targeted participant and employer recruitment strategies in place?**
- Yes
  - No
  - Unsure

- 2. Are you meeting your job seeker and employer recruitment goals?**
- Yes
  - No
  - Unsure
- 3. Do you need more than the prescribed time periods to enroll your participants? If so, optimally, how much more time do you need?**
- Yes
  - No
  - Unsure
- 4. Do you have incentives in-place to keep participants and employers engaged?**
- 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.