**PROGRAM MANAGEMENT TOOL**



**INTRODUCTION**

**Candidate Selection and Participant Intake and Assessment Planning Tool**

**The objective of program management is to ensure that your program has:**

* Identify and enroll individuals from your target population who (with support) are likely to be able to benefit from and successfully complete your program

**Please note: Step-by-Step design tools for each essential program element (Recruitment, Assessment and Selection, Education and Training, Case Management and Support Services, Placement Services, Retention and Advancement Services, Outcome Planning) are available for your use. Each of them includes a section on program management and staffing.  This tool supports you to compile the information from each of the step-by-step tools into one document, giving you a comprehensive review of staffing and management needs across the entire program.**

**There are four steps in developing your Program Management Plan:**

**Step 1** → Identify Staffing Skills and Capacity you need to carry out your program effectively and who will perform each role, either in-house or through a contract

**Step 2** → Identify your technology, data and system needs and develop a plan to meet those needs

**Step 3** → Identify your communication and partnership management needs and develop a plan to meet those needs

**Step 4** → Identify the resources you will need to effectively carry out your program

**STEP 1**

**Identify Staffing Skills and Capacity Needed to Carry Out the Program**

**Identify Staffing Skills and Capacity you need to carry out the program. Identify who will carry out each of these services.**

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| **QUESTIONS** | **YOUR STAFFING PLAN** |
| What is the length of your planned grant period?    Identify the number of cohorts you plan to train, the number of participants in each cohort and the timing of each cohort over the entire grant period. |  |
| Develop a Staffing Plan for each element of your program including:   * Recruitment, Assessment and Screening * Training * Case Management and Support Service * Employer Engagement and Placement * Retention and Advancement services * Convening and Partnership Relationship Management * Data Management and Reporting * Overall Program Management |  |
| For each role, what is the level of effort (in FTEs over the entire grant period) and the salary and benefit cost? |  |
| Who in your organization will have overall responsibility for each of these services? |  |
| If you have an open position that you will need to fill, what are the skill sets that are required for that position? |  |
| If you are contracting with an external organization, what is the name of the individual at the organization who will be responsible for service delivery?  What is the scope of work, duration and budget for the contract? |  |
| Management – who in your organization has overall responsibility for the program and what is their decision-making authority or access to decision-makers? |  |

**STEP 2**

**Identify your Technology, Data and System Needs; Develop a Plan to Meet Them**

**What methods will you use to assess candidates’ fit with your screening criteria?**

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| **QUESTIONS** | **YOUR TECHNOLOGY, DATA AND SYSTEMS PLAN** |
| What data do you need to collect and analyze? Remember, the objective of your sector program is to prepare participants to secure and retain employment in a targeted occupation or set of occupations with similar skill requirements.   * What data do you need to collect to assess the overall effectiveness of your program? * What data do you need to collect in the recruitment, assessment and screening phase of your program? * What data do you need to collect to assess participants’ progress toward attaining the targeted skills? |  |
| What data and information do funders require? |  |
| How will you collect this data and information? |  |
| Do funders provide a data management system? |  |
| If not, what platform will you use to collect and analyze program data and produce reports? A spreadsheet?  A database? |  |
| How often will you review the data? How will you use the data to improve program performance? |  |
| How often will you report to funders? |  |
| Do you need data sharing agreements with any partners? What needs to be included in that agreement? |  |
| How will you ensure that participant data are secure? |  |
| What is your participant information confidentiality policy? |  |
| What technology and/or platforms do you need to carry out the program?  Do you need to purchase licenses for software?  Do you need to purchase equipment for participants or staff? |  |
| Do staff need to be trained to use the equipment or software? |  |

**STEP 3**

**Identify Your Communication and Partnership Management Needs; Develop a Plan to Meet Them**

**Identify Partnership Development & Communications Systems Needs and Develop a Plan**

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| **QUESTIONS** | **YOUR PARTNERSHIP DEVELOPMENT & COMMUNICATIONS PLAN** |
| What data and topics will the Partnership focus on? |  |
| What is the decision-making hierarchy and process within the Partnership? |  |
| How often will the Partnership meet? |  |
| What are your protocols for communicating with Partnership members between meetings? |  |
| Will you need to add partners over time? If so, who is responsible for doing that? |  |

**STEP 4**

**Identify the Resources You Will Need to Carry Out Your Program Effectively**

**Develop the Resource and Budget Plan**

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| **QUESTIONS** | **YOUR RESOURCE AND BUDGET PLAN** |
| Develop a budget for your organization’s Staffing and Related costs (travel, supplies, office space, fringe benefits, etc.) based on the decisions you made in Step 1 |  |
| Develop your contracted services budget as identified in Step 1 |  |
| Develop your Data Management and Technology budget (licenses, equipment, training, etc.) based on decisions you made in Step 2 |  |
| Develop your Partnership and Communication budget (meeting space and convening costs, etc.) based on decisions you made in Step 3 |  |
| Identify Other Program Costs including marketing, training-related costs and instructional materials, training space, material translation, certification testing, support services costs, retention services, etc.). |  |
| These costs should be based on the prospective number of cohorts and size of the cohorts, the per person training costs, and the number likely to require each support service and retention service and the associated costs. |  |
| If the grant you are applying for has a match requirement, identify matching contributions such as space, employers’ and other partners’ time or in-kind contributions, cash contributions, etc. |  |
| Develop your comprehensive budget for the program, including, if required, the match contributions |  |
| Identify potential funding sources and strategies to resource the program if funding sources or insufficient or you do not have sufficient match to meet the requirement for the grant you are applying for. |  |