**RECRUITMENT PLANNING TOOL**



**INTRODUCTION**

**Recruitment Planning Tool**

**The objective of recruitment is to fill your program seats with individuals who:**

* Are from your target population
* Successfully complete your program
* Become employed or move on to additional related training following your program

**This tool is designed to help you plan and manage your recruitment activities through 4 phases:**

**Step 1** → Develop a Profile of Your Target Population

**Step 2** → Assess Potential Recruitment Methods

**Step 3** → Develop Materials, Messages, Recruiting Relationships

**Step 4** → Develop Your Recruitment Management Plan

**STEP 1**

**Develop a Profile of Your Target Population**

**List the characteristics of your target population**

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| **QUESTIONS** | **ANSWER HERE** |
| This might include:   * Employment status * Employment history * Level of educational attainment * Age * English language proficiency * Access to technology and technology literacy |  |
| What are indicators that an individual would be appropriate for (could benefit from) your program? |  |
| How would they benefit from it? |  |
| What questions might they need answered to help them decide whether to explore it? |  |
| Why might they want to participate in it? |  |

**STEP 2**

**Assess Potential Recruitment Methods**

**Begin by reviewing the questions in this section.**

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| **QUESTIONS** | **ANSWER HERE** |
| Do you have the relevant perspective and knowledge to be able to answer these questions? If not, who does and how will you engage them in this process? |  |
| What geographic area(s) does your target population reside in? |  |
| What organizations do they trust as sources of information? |  |
| Which of these do you already have relationships with? |  |
| Which would you need to develop a relationship with? |  |
| What organizations do they regularly interact with? |  |
| Which of these do you already have a relationship with? |  |
| Which would you need to develop a relationship with? |  |
| Does your organization provide other types of services to members of your target population? |  |
| How could you leverage this relationship to market the program to them? |  |
| What types of individuals (teachers, health care professionals, religious leaders, community leaders, staff at community-based organizations or MassHire Career Centers) would they trust as sources of information? |  |
| How could you engage these individuals in recruitment? |  |
| Is there a community or neighborhood association that could help? |  |
| Would elected officials help share information about the program? |  |
| Is there a community health center where you could post information?   * A parent information resource center at schools? * A MassHire Career Center? |  |

**Review the questions in this section.**

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| **QUESTIONS** | **ANSWER HERE** |
| What specific media (radio station, local newspaper, community or religious institution bulletin, social media) do they engage with? |  |
| Which of these does your organization currently engage with? |  |
| Which should you add to your engagement activities? |  |
| Would it be effective to translate materials into any other languages?   * If so, which languages? |  |
| Are you planning to post/leave flyers in community locations?   * If so, which locations? * Do you need to ask permission? |  |
| Would it be effective to hold information sessions?   * If so, what location will you hold them at? * Why have you chosen this location? |  |
| Have you run this program or a similar program previously? |  |
| What referral sources and methods worked? |  |
| What would former graduates say about the program? |  |
| Would former graduates be willing to refer candidates to you? |  |

**STEP 3**

**Develop Materials, Messages, Recruiting Relationships**

**Develop clear concise recruiting message that includes:**

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| **QUESTIONS** | **YOUR OVERALL RECRUITING MESSAGE** |
| The benefits of the program |  |
| The core elements of the program |  |
| The time commitment |  |
| Any essential pre-requisites |  |
| The specific next step a candidate should take – who to contact and how |  |

**Customize Recruiting Message**

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| **QUESTIONS** | **YOUR OVERALL RECRUITING MESSAGE** |
| Customize the recruiting message to fit each of your planned media methods (flyer, notice in a bulletin or newspaper, social media, radio, other) |  |

**Information Session Development**

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| **QUESTIONS** | **YOUR INFORMATION SESSION AGENDA, LOCATIONS AND SPEAKERS** |
| If you are planning to hold information sessions, develop a session agenda and identify the locations and speakers |  |

**If you are planning to hold information sessions:**

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| **QUESTIONS** | **ANSWER HERE** |
| Do you need to develop any other materials? If so, who will develop them? |  |
| Will you provide food? |  |
| Will you provide childcare? |  |
| How will you market the sessions? |  |
| Do you want people to register in advance? If so, how will they do this? |  |

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| **QUESTIONS** | **ANSWER HERE** |
| Do you have a relevant perspective to be able to assess whether your materials and messages will be effective? |  |
| If not, who will you ask to help with this? |  |

**Develop Recruitment Partners**

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| **QUESTIONS** | **LIST YOUR RECRUITING PARTNER ORGANIZATIONS AND INDIVIDUALS** |
| Identify recruitment partner organizations and individuals and develop recruiting relationships with them. |  |
| Share with them characteristics of your target population and indicators that an individual would be appropriate for (could benefit from) your program. |  |
| MassHire Career Centers have staff who help job seekers find training and placement programs. Consider them as recruitment partners. |  |
| Will you follow up with organizations or individuals who directly refer candidates to you to let them know what happened? |  |

**STEP 4**

**Develop Your Recruitment Management Plan**

**Develop a recruitment schedule:**

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| **QUESTIONS** | **ANSWER HERE** |
| When will you begin recruitment activities? |  |
| Work backward from your planned program start date(s). How much lead time do you need to conduct interviewing, screening and selection activities? |  |
| If you are planning to hold information sessions, when will they take place? |  |
| How many seats do you have in each cycle of your program? |  |
| How many individuals will you need to engage with during the recruitment phase to fill the seats? |  |

**Develop a Recruitment Data Collection and Analysis Plan. Remember - the objective of recruitment is to fill your program seats with individuals who:**

* Are from your target population
* Successfully complete your program
* Become employed or move on to additional related training following your program.

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| **QUESTIONS** | **ANSWER HERE** |
| What information would it be helpful to have about each person who contacts you or attends an information session? How will you get this information? |  |
| What information would help you to assess the effectiveness of each of your recruitment methods and sources? How will you get this information? |  |
| What methodology will you use to record the information? A spreadsheet? A database? |  |
| When will you review the data? During recruitment? After the recruitment period has ended? After the program cycle has ended? |  |

**Develop a Recruitment Staffing Plan**

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| **QUESTIONS** | **INTERNAL STAFF NAME** | **EXTERNAL STAFF NAME/ORGANIZATION** |
| Overall Recruitment Management: Who in your organization will have overall responsibility for managing recruitment? |  |  |
| Materials and Message Development: Who will review draft outreach materials and messages for cultural appropriateness and effectiveness? |  |  |
| Materials Translation: Who will translate materials into other languages if needed? |  |  |
| Materials Dissemination: Who will be responsible for posting flyers, bulletins in community locations? |  |  |
| Information Sessions: If you plan to hold information sessions:   * Who will be responsible for developing materials? * Who will be responsible for managing registration and follow up? * Who will be responsible for conducting the sessions? |  |  |
| Relationship Management: Who will be responsible for conducting outreach to and engaging with recruitment partner organizations and individuals? |  |  |
| Social Media Management: Who will be responsible for managing your social media strategy and activities? |  |  |
| Recruitment Data Collection: Who in your organization will be responsible for developing your data collection methodology and maintaining your recruitment data? |  |  |
| Recruitment Data Analysis: Who in your organization will be responsible for analyzing the recruitment data to assess the effectiveness of each of your recruitment methods and sources? |  |  |

**Develop a Recruitment Resource Plan/Budget.**

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| **QUESTIONS** | **ANSWER HERE** |
| For internal staff identified in your recruitment staffing plan outlined above: What is your projected level of effort (in FTEs over the entire period of your program) and salary and benefit cost? |  |
| Will staff have travel costs associated with recruitment? If so, what is the projected cost? |  |
| Will there be contractual costs associated with external staff identified in your recruitment staffing plan outlined above? If so, what is the projected cost? |  |
| What is your projected cost for printing outreach materials? |  |
| What is your projected cost for translating materials if you don’t have the capacity in-house? |  |
| Is there any subscription cost or other cost associated with your planned social media campaign? If so, what is the projected cost? |  |
| Is there any cost associated with other media you plan to use (radio, newspaper, other)? If so, what is the projected cost? |  |
| What are the projected costs associated with holding information sessions (food, location, other)? |  |
| Other than staff, are there costs associated with your data collection and analysis plan (database subscriptions, other)? If so, what is the projected cost? |  |
| For internal staff identified in your recruitment staffing plan outlined above: What is your projected level of effort (in FTEs over the entire period of your program) and salary and benefit cost? |  |

**STEP 5**

**Develop a Partnership Agreement or Memorandum of Understanding with Employers**

**Develop a partnership agreement (and/or MOU) with organizations providing all or components of placement services.**

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| **QUESTIONS** | **ANSWER HERE** |
| What are the objectives of the partnership and the effective dates? |  |
| What are the services that will be provided, and will these require new or customized programming? |  |
| What is the planned number of participants and planned number of program cycles? |  |
| How will you work together to share information about each participant’s progress? |  |
| Who is responsible for reporting to the funder on placement outcomes and providing all necessary documentation? |  |
| What is the program cost and each organization’s share; are there any payment requirements or restrictions? |  |
| What are the specific roles and responsibilities in program delivery? |  |
| What is the partnership’s decision-making process? |  |
| Who owns intellectual property and data? |  |
| How will you work to learn and improve the program? |  |

**Develop an MOU with employer partners.**

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| **QUESTIONS** | **ANSWER HERE** |
| What are the objectives of the partnership and the effective dates? |  |
| What is your organization committing to the partnership? |  |
| What are the employers committing to the partnership? |  |
| In what ways will they interact with the program? |  |
| In what ways will they interact with participants? |  |
| Are they committing to provide input/feedback on curriculum and program design? |  |
| Are they committing to interview graduates? Hire graduates? |  |
| Who are the authorized signatories for each organization? |  |

**STEP 6**

**Develop Your Placement Services Management Plan**

**Develop placement services data collection and analysis plan. Remember - the objective of placement services is to ensure that participants can:**

* Develop a resume and complete an application, including online applications and
* Successfully conduct job search activities and
* Find a job related to the training program that they completed

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| **QUESTIONS** | **YOUR DATA COLLECTION PLAN** |
| What information would help you to assess the effectiveness of your placement services? How will you get this information? |  |
| What methodology will you use to record the information? A spreadsheet? A database? |  |
| When will you review the data? During the program? After the program cycle has ended? Annually to determine impact on employment retention or advancement? |  |
| What are funder requirements regarding tracking and reporting on placement outcomes and necessary document? How will you meet these requirements? |  |

**Develop a Placement Services Staffing Plan**

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| **QUESTIONS** | **YOUR PLACEMENT SERVICES STAFFING PLAN** |
| Who in your organization will have overall responsibility for managing placement services? | **QUESTIONS** |
| Who in your organization will be responsible for reaching out to employers, building employer relationships and doing job development? |  |
| Who in your organization will be responsible for referring individual participants to hiring opportunities and supporting their hiring experience? |  |
| In what If you are contracting with an external agency, what is the name of the individual at the agency who will be responsible for managing placement services for your participants and employer relationships? will they interact with the program? |  |
| Placement Services Data Collection: Who in your organization will be responsible for developing your data collection methodology and collecting, tracking, and maintaining your placement services data and collecting documentation required by funders? |  |
| Placement Services Data Analysis: Who in your organization will be responsible for analyzing the placement services data to assess the effectiveness of the services? |  |

**Develop a Placement Services Staffing Resource Plan/Budget**

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| **QUESTIONS** | **YOUR PLACEMENT SERVICES STAFFING PLAN** |
| For internal staff identified in your placement services staffing plan outlined above: What is your projected level of effort (in FTEs over the entire period of your program) and the salary and benefit cost? | **QUESTIONS** |
| Will your internal staff have travel costs associated with placement services? If so, what is the projected cost? |  |
| Will there be contractual costs associated with an external agency identified in your placement services staffing plan outlined above? If so, what is the projected cost? |  |

**Develop a Placement Services Non-Staff Budget. Other than internal or external staff, what are the projected placement services costs for each cohort (licensing software, hosting employers’ meetings) that will not be covered either by in-kind or through other funding sources?**

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| **QUESTIONS** | **YOUR DATA COLLECTION PLAN** |
| For each prospective cohort: how many people are likely to need the resource or service? | **QUESTIONS** |
| What is the cost per resource or service? |  |
| Is it fixed or negotiable? |  |
| Are there additional costs such? If so, what are they? |  |
| Other than staff, are there costs associated with your data collection and analysis plan (database subscriptions, other)? If so, what is the projected cost? |  |