**RETENTION**

**SERVICES PLANNING TOOL**



**INTRODUCTION**

**Retention Services Planning Tool**

**The objective of retention services is to ensure that participants can:**

* Retain employment with the same employer after being placed in a job **OR**
* Retain employment in the same industry with a different employer if the first placement is not successful **AND**
* Avoid cliff effects in public benefits **AND**
* Advance in their career

**This tool is designed to help you plan and manage your retention services strategy through five phases:**

**Step 1** → Identify Participants’ Retention and Advancement Services Needs

**Step 2** → Identify Employers’ Retention Services Needs

**Step 3** → Design Your Retention Services Model

**Step 4** → Identify Retention Services Partners

**Step 5** → Develop Your Retention Services Management Plan

**STEP 1**

**Identify Participants’ Retention and Advancement Services Needs**

**List the likely retention services needs of enrollees, based on knowledge and previous work with the target population.**

Childcare ..............................................................................…………………………………………………...

Transportation ............................…………………………………………………………………………………………...

Housing …………………………………….........................................…………………………………………………...

Tutoring …………………………………………..........................…………………………………………….….…………...

Healthcare or behavioral health care …………………………………………………………………………………….

Accessing public benefits and mitigating cliff effects ..................……………………………………….…...

Emergency Assistance .............................…………………………………………………………………….………...

Career coaching, which may include …………..………………………………………………………………………....

* Problem solving to resolve issues
* Understanding career and education pathways to gain credentials, certifications and skills needed to advance
* Understanding how to access tuition reimbursement or other financial aid
* Understanding how to access other employer benefits
* Developing and building their networks
* Applying to jobs inside and outside of their current employer

**Review the list of likely retention services needs with partnering organizations, instructors, and employer partners.**

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| **QUESTIONS** | **ANSWER HERE** |
| Do partnering organizations and instructors agree with the list and/or add any likely services? |  |
| Do employer partners agree with the list? |  |
| What, if any, are additional services suggested by partnering organizations, instructors and employers? |  |

**STEP 2**

**Identify Employers’ Retention Services Needs**

**List the retention supports that employer partners may need to improve their retention of employees and grow the talent for high demand positions from within.**

**These might include:**

Job quality coaching and advice …........................................……………………………………………………………….………...……………...

Onsite career coaching with program graduates …………………………………………………………………………..………………...

Supporting graduates to access the full range of benefits,

including education and training benefits ……………..............………………………………………………………………………………...

Problem solving with employers and graduates if retention issues develop ………….….…………………...

Coaching to connect graduates to public benefits and needed services ……..…………………………..……….

**Validate the list of retention services with employer partners and employers who have hired graduates of other programs you operate.**

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| **QUESTIONS** | **ANSWER HERE** |
| Do they recommend additional or different services? |  |
| Are the services they recommend feasible without additional resources? |  |
| If not, is the employer willing to provide resources to support retention services? |  |

**STEP 3**

**Design Your Retention Services Model**

**Review the questions in this section.**

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| **QUESTIONS** | **ANSWER HERE** |
| What is your retention goal?  How do your funders define retention? |  |
| What are the immediate needs that graduates have in order to accept and retain a job? |  |
| Who are the referral partners who can provide support services necessary for retention?  What services does each provide?  Do they have financial assistance or provide coaching around how to access public benefits to pay for support services? |  |
| How often will you check in with graduates to see how the placement is working and identify any issues that may be developing? |  |
| How often will you check in with employers to see how the placement is working and identify any issues that may be developing? |  |
| Will you provide organized and scheduled alumni services?  If so, what services, how will they be delivered and how often will alumni be able to access services? |  |
| How will you identify advancement opportunities in the industry?  What are the skills, credentials and certifications needed to advance? |  |
| How will you identify employer benefits and how to access those benefits? |  |
| How will you coach graduates around advancement and benefits? |  |
| For how long will you provide retention services? |  |
| Will you provide this service in-house or through a partnership? |  |
| If in-house, what are the skill sets that you are seeking in retention services staff?  What are the other resources they will need to be successful? |  |
| If you are partnering, what are the skill sets and capacities you are looking for in a partner? |  |

**Identify public benefits that might be used by participants and graduates and the rules regarding those benefits to mitigate cliff effects as graduates approach income caps.**

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| **QUESTIONS** | **ANSWER HERE** |
| What are the benefits participants and graduates are likely to be receiving? These might include Medicaid, Food Stamps, TANF, Childcare vouchers, Housing subsidies and Transportation subsidies. |  |
| What are the rules for accessing these services in terms of income eligibility? |  |
| How will you determine the impact on access to these benefits for individual graduates? Are there publicly available calculators that you will use? |  |
| How will you coach graduates to manage potential cliff effects? |  |

**STEP 4**

**Identify Retention Services Partners**

**Identify organizations that can partner with you to provide some or all components of retention services.**

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| **QUESTIONS** | **ANSWER HERE** |
| Who are the providers that you are partnering with to provide support services to participants? |  |
| Can those providers continue to work with graduates after they are placed into employment? |  |
| What retention services components is your organization well positioned to provide?  Which are you not well-positioned to provide? |  |
| What skills, knowledge and capacities are you looking for from a retention partner? |  |

**Identify the ways in which employers will work with you to support retention.**

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| **QUESTIONS** | **ANSWER HERE** |
| Do employer partners have retention and advancement services that employees can access?  Are they eligible for these immediately or is there a probationary period? |  |
| How will you coordinate with employers to ensure that you are leveraging their internal capabilities and services? |  |
| How will you communicate with employers about retention and advancement? |  |
| How will you secure permission from your graduates to discuss their retention and advancement with their employer? |  |
| Will you ask employer partners to sign a Memorandum of Understanding including retention and advancement services? |  |

**STEP 5**

**Develop Your Retention Services Management Plan**

**Develop a Retention Services Data Collection and Analysis Plan. Remember - the objective of retention services is to ensure that participants can:**

* Retain employment with the same employer after being placed in a job **OR**
* Retain employment in the same industry with a different employer if the first placement is not successful  **AND**
* Avoid cliff effects in public benefits **AND**
* Advance in their career

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| **QUESTIONS** | **YOUR DATA COLLECTION PLAN** |
| What information would help you to assess the effectiveness of your retention 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? At 30 days? 90 days? 180 days?  Annually? |  |
| What are your funders’ requirements regarding tracking and reporting on retention outcomes and necessary documentation?  How will you meet these requirements? |  |

**Develop a Retention Services Staffing Plan**

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| **QUESTIONS** | **YOUR STAFFING PLAN** |
| Who in your organization will have overall responsibility for managing retention services? |  |
| Who in your organization will be responsible for reaching out to referral partners to access support services for graduates? |  |
| Who in your organization will be responsible for reaching out to employers to understand how placements are working out and if/what interventions are necessary for the graduate to retain and advance in the job? |  |
| Who in your organization will be responsible for referring individual participants to post placement support services? |  |
| Who in your organization will be responsible for career coaching including how to access training, education, and financial assistance to continue to gain skills necessary for advancement? |  |
| Who in your organization will be responsible for designing and executing alumni services (if you are doing so)? |  |
| If you are contracting with an external agency, what is the name of the individual at the agency who will be responsible for managing retention services for your participants and employer relationships? |  |
| Retention Services Data Collection: Who in your organization will be responsible for developing your data collection methodology and collecting, tracking, and maintaining your retention services data and collecting documentation required by funders? |  |
| Retention Services Data Analysis: Who in your organization will be responsible for analyzing the retention services data to assess the effectiveness of the services? |  |

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

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| **QUESTIONS** | **YOUR DATA COLLECTION PLAN** |
| For internal staff identified in your retention 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? |  |
| Will your internal staff have travel costs associated with retention services? If so, what is the projected cost? |  |
| Will there be contractual costs associated with an external agency identified in your retention services staffing plan outlined above? If so, what is the projected cost? |  |

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

* For each prospective cohort: how many people are likely to need the resource or service?
* What is the cost per resource or service?
* Is it fixed or negotiable?
* Are there additional costs such? If so, what are they?

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| **QUESTIONS** | **YOUR STAFFING RESOURCE PLAN/BUDGET** |
| Other than staff, are there costs associated with your data collection and analysis plan (database subscriptions, other)? If so, what is the projected cost? | **QUESTIONS** |