**SUPPORT SERVICES PLANNING TOOL**



**INTRODUCTION**

**Support Services Planning Tool**

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

1. Successfully complete your program
2. Become employed
3. Maintain employment and be prepared for career success

**This tool is designed to help you plan and manage your support services strategy through 5 phases:**

**Step 1** → Identify Participants’ Support Services Needs

**Step 2** → Develop Your Support Services Model

**Step 3** → Identify Support Services Providers and Build Referral Relationships

**Step 4** → Develop a Partnership Agreement

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

**STEP 1**

**Identify Participants’ Support Services Needs**

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

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

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

Citizenship Services ………………………………….......................................................……………………..……………………………...

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

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

Uniforms and Tools ..................…………………………………………………………………………………………………………………..……...

Training Stipends and/or Wage Subsidies .............................………………………….…………….……………………...

Flexible spending pool ………………….………………………………………………………………..……………………………………………....

**Review the list of likely support services needs with partnering organizations and validate review of assessment information.**

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| **QUESTIONS** | **ANSWER HERE** |
| Do partnering organizations agree with the list and/or add any likely services? |  |
| What, if any, are additional services suggested by partnering organizations? |  |
| Do assessments of candidates for the program suggest other support service needs? |  |

**STEP 2**

**Develop Your Support Services Model**

**Determine your process for identifying the needs of each individual participant during program implementation.**

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| **QUESTIONS** | **ANSWER HERE** |
| How will you identify potential support service needs? When will you do this (during recruitment, after acceptance and during enrollment, after enrollment, other)? |  |
| How often will you engage with individual participants to provide case management services? |  |
| How will you document support service needs and the results of connecting to service providers? |  |
| How will you engage with instructional staff to identify any program retention and placement support service needs? |  |
| If your program includes stipends and/or wage subsidies, how will those be paid? Will there be any benchmarks tied to payments? If so, what are they? |  |

**Determine whether your organization will provide case management and support services in-house or through a contract with a partnering agency.**

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| **QUESTIONS** | **ANSWER HERE** |
| Does your organization have sufficient knowledge of and experience with the target population to effectively assess and address their support services needs? |  |
| Does your organization have expertise in trauma-informed supports and services? |  |
| Does your organization have referral relationships with organizations that can provide specific support services? |  |

**If you determine that you will provide case management and support services in-house:**

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| **QUESTIONS** | **ANSWER HERE** |
| What skill sets and expertise do your case management staff need? |  |
| How will all staff involved with the program share information and participate in case management? |  |
| What other tools or resources do you need to support case management and support services referrals? |  |

**If you determine that you will partner/contract with another agency to provide case management and support services:**

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| **QUESTIONS** | **ANSWER HERE** |
| What expertise and capacity are you looking for in a case management and support services partner? |  |
| Are you looking for a partner that provides support services directly? If so, which support services are your priorities? |  |
| What commitments are you looking for from a case management and support services partner (data sharing, documentation and record keeping, case management meetings, other communication)? |  |

**STEP 3**

**Identify Support Services Providers and Build Referral Relationships**

**Conduct a landscape analysis of support service providers in your geography.**

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| **QUESTIONS** | **ANSWER HERE** |
| Which organizations have a strong reputation for providing case management and support services, including trauma-informed supports and services? |  |
| Which organizations have experience serving your target population? |  |
| What are the support services capacity in the area for each of the likely support services: Childcare, Transportation, Tutoring, Citizenship services, Housing, Healthcare, Other? |  |
| Which organizations are interested in and willing to partner to provide support services? |  |

**Develop formal referral processes.**

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| **QUESTIONS** | **ANSWER HERE** |
| Are there eligibility requirements to access support services through partners? If so, what are those requirements? |  |
| How (what is the process they use) do support services partners assess whether a participant meets eligibility requirements? |  |
| Is there any flexibility? |  |
| What documentation do you need to provide? What documentation does the participant need to provide? |  |
| Are the services paid for through the partner or will you need to budget for the services in the program budget? If you need to budget, what are the costs per participant? |  |
| How do you want to institutionalize referral agreements, roles and responsibilities? Memorandum of Understanding? Contract? |  |

**Develop a Staffing Plan**

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| **QUESTIONS** | **INTERNAL STAFF** | **EXTERNAL STAFF** |
| Overall Screening/Selection Management: Who in your organization will have overall responsibility for managing applicant screening and selection? |  |  |
| Will anyone else in your organization be involved in applicant screening and selection? |  |  |
| If you will be partnering with an external agency to conduct any aspect of applicant screening and selection, what is the name of the individual at the agency you will be working with? |  |  |
| Will anyone else from outside your organization be involved in applicant screening and selection? If so what is/are their name(s) and organization(s)? |  |  |
| Screening/Selection Data Collection: Who in your organization will be responsible for developing your data collection methodology and maintaining your screening/selection data? |  |  |
| Screening/Selection Data Analysis: Who in your organization will be responsible for analyzing the data to assess the effectiveness of your screening/selection processes? |  |  |

**Develop a Screening/Selection Resource Plan/Budget**

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| **QUESTIONS** | **ANSWER HERE** |
| For internal staff identified in your screening/selection 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 there be contractual costs associated with external staff identified in your screening/selection plan outlined above? If so, what is the projected cost? |  |
| What are the projected costs associated with your screening/selection process (testing fees, 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? |  |

**STEP 4**

**Develop a Partnership Agreement**

**If the Support Services Provider is a good fit, develop a written agreement (MOA or Letter of Commitment) For a Partnership with a Case Management and Support Services Provider to Serve as a Vendor for a Group of Participants Supported Through a Grant-Funded Project**

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| **AGREEMENT ELEMENTS** | **PROPOSED SPECIFIC AGREEMENT**  **LANGUAGE FOR EACH ELEMENT** |
| The objective of the partnership and effective dates |  |
| A brief description of the service delivery model, including whether this will require new or customized programming |  |
| Planned number of participants, planned number of program cycles |  |
| How you will work together to share information (if participants agree) about each participant’s progress on an ongoing basis and provide coordinated support to them |  |
| Program cost and each organization’s share; any payment requirements/restrictions |  |
| Specific roles and responsibilities in program delivery (recruitment, instruction, participant support, placement, other) |  |
| The decision-making process that partnership members will use |  |
| Clarify ownership of intellectual property and data |  |
| The continuous improvement process partnership members will engage in jointly |  |

**STEP 5**

**Develop Your Support Services Management Plan**

**Develop a Support Services Data Collection and Analysis Plan. Remember - the objective of case management and support services is to ensure that participants can**

* Succeed in the program
* Secure and maintain employment
* Be prepared for career advancement

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| **DEVELOP SUPPORT SERVICES DATA COLLECTION AND ANALYSIS PLAN** | **YOUR DATA COLLECTION PLAN** |
| What information would help you to assess the effectiveness of your case management and support 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? |  |

**Develop a Support Services Staffing Plan**

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| **QUESTIONS** | **INTERNAL STAFF** | **EXTERNAL STAFF** |
| Who in your organization will have overall responsibility for managing support services? |  |  |
| Who in your organization will be responsible for connecting individual participants to support services? |  |  |
| Who in your organization will be responsible for coordinating services with partner organizations and individuals? |  |  |
| If you are contracting with an external agency, what is the name of the individual at the agency who will be responsible for managing support services for your participants? |  |  |
| Support Services Data Collection: Who in your organization will be responsible for developing your data collection methodology and maintaining your support services data? |  |  |
| Support Services Data Analysis: Who in your organization will be responsible for analyzing the support services data to assess the effectiveness of the services? |  |  |

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

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| **QUESTIONS** | **ANSWER HERE** |
| For internal staff identified in your support 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 support services? If so, what is the projected cost? |  |
| Will there be contractual costs associated with an external agency identified in your support services staffing plan outlined above? If so, what is the projected cost? |  |

**Develop Support Services Non-Staff Plan/Budget**

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| **QUESTIONS** | **ANSWER HERE** |
| Other than internal or external staff, what are the projected support services costs for each cohort (childcare, transportation, citizenship services, tutoring, housing, healthcare, uniforms and tools, training stipends and/or wage subsidies) that will not be covered either by referral agencies’ budgets or through other funding sources? |  |
| For each prospective cohort: how many people are likely to need each service (childcare, transportation, citizenship services, tutoring, housing, healthcare, uniforms and tools, training stipends and/or wage subsidies)? |  |
| What is the cost per service? |  |
| Is it fixed or negotiable? |  |
| Are there additional costs such as fees, books, uniforms/tools, testing for credentials, credential application? If so, what are they? |  |
| Do any of your partner organizations provide financial assistance? If so, what is it? |  |
| Other than staff, are there costs associated with your data collection and analysis plan (database subscriptions, other)? If so, what is the projected cost? |  |