Build the Foundation—YOUR STAFF Checklist
Intermediary Grantees

September 2018 – Beta Version

Welcome to the Build the Foundation 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

As an Intermediary Grantee, you have the dual responsibility of evaluating your program's progress, as well as your sub-grantees' ability to deliver on their promises. As such, two checklists are provided.

Your leadership team can fill out the forms or you can have your staff members complete and 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.

Answer the following questions as an Intermediary Grantee, evaluating your own program's progress.

1. **Does your program have a comprehensive plan to address the following risk factors? Check all that apply:**
   - ☐ Lack of employment
   - ☐ Educational and vocational skill deficiencies
   - ☐ High poverty/financial challenges
   - ☐ Interpersonal communication
   - ☐ Health and wellness (i.e., substance abuse and mental health)
   - ☐ Family challenges
   - ☐ Childhood trauma, domestic violence, sexual abuse
   - ☐ Housing/shelter
   - ☐ Other _____

2. **Do your intermediary partners provide the following services? Check all that apply:**

- ☐ Employment-focused services including:
  - Registered Apprenticeship
  - Career Pathways
  - Work-based learning
- ☐ Soft skills training
- ☐ Job search
- ☐ Job retention
- ☐ Education and vocational credentials
- ☐ Wrap-around services
- ☐ Mentoring:
  - One-on-one/group
  - Life coaching
  - Other _____
- ☐ Financial literacy
- ☐ Legal services
- ☐ Other _____
- ☐ All of the above

3. **Reviewing your proposed list of services from your Statement of Work (SOW) and your intermediaries' capacity to deliver them, do you have what you need to move your activities forward?**
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

4. **Are all strategies supported by experienced, professional staff?**
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

5. **Are your strategies:**
   Evidence-based and informed? (Approaches that are validated by documented scientific evidence or studies.)
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

   Client-centered as opposed to results-based? (Approaches that provide services to participants in a coordinated manner so they have access to needed resources, and information and assistance, ultimately enabling them to become self-sufficient.)
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

6. **Are planning processes logical and consistent?**
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

7. **Does your planning process help you stay pro-active rather than re-active? For example, are processes in place to report on placement information when asked or do you find yourself scrambling when such a request arises?**
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

8. **Did you fulfill your planning period milestones?**
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

Thank you for completing the Build the Foundation 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: Build the Foundation—Resource Guide and Workbook can help you.

Build the Foundation—SUB-GRANTEE Checklist
Intermediary Grantees

September 2018 – Beta Version

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- ☑ 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

As an Intermediary Grantee, you have the dual responsibility of evaluating your program's progress, as well as your sub-grantees' ability to deliver on their promises. As such, two checklists are provided.

Your leadership team can fill out the forms or you can have your staff members complete and 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.

Answer the following questions, as the entity which tracks the progress of your sub-grantees.

1. **Do sub-grantees have comprehensive plans to address the following risk factors? Check all that apply:**
   - ☐ Lack of employment
   - ☐ Educational and vocational skill deficiencies
   - ☐ High poverty/financial challenges
   - ☐ Interpersonal communication
   - ☐ Health and wellness (i.e., substance abuse and mental health)
   - ☐ Family challenges
   - ☐ Childhood trauma, domestic violence, sexual abuse
   - ☐ Housing/shelter
   - ☐ Other _____
   - ☐ All of the above

2. **Do sub-grantee programs include the following services? Check all that apply:**
   - ☐ Employment-focused services including:
     - Registered Apprenticeship
     - Career Pathways
     - Work-based learning
   - ☐ Soft skills training
   - ☐ Job search
   - ☐ Job retention
   - ☐ Education and vocational credentials
   - ☐ Wrap-around services
   - ☐ Mentoring:
     - One-on-one coaching/group
     - Life coaching
     - Other _____
   - ☐ Other _____
   - ☐ All of the above

3. **Reviewing your sub-grantees' proposed list of services and their capacity to deliver them, do they have what they need to move their activities forward?**
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

4. **Are strategies supported by experienced, professional staff?**
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

5. **Are their strategies:**
   Grounded in evidence-based practices? (Approaches that are validated by documented scientific evidence or studies.)
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

   Client-centered as opposed to outcome-based? (Approaches that provide services to participants in a coordinated manner so they have access to needed resources, information and assistance, ultimately enabling them to become self-sufficient.)
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

6. **Are sub-grantee planning processes logical and consistent?**
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

7. **Do their planning processes help them stay pro-active rather than re-active? For example, are processes in place to report on placement information when asked or do your sub-grantees find themselves scrambling when such a request arises?**
   - ☐ Yes
   - ☐ No
   - ☐ Unsure

8. Did sub-grantees fulfill their planning period milestones?

- ☐ Yes
- ☐ No
- ☐ Unsure

Thank you for completing the Build the Foundation 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: Build the Foundation—Resource Guide and Workbook can help you.