

A Planning Guide For Developing Strategies To Connect Industry – Education – Community

Introduction

Home Builders Institute, Workforce Development Department Technical Assistance is designed to use a planning process as an effective business tool and to foster existing resources to implement projects and programs to benefit in-school youth, out-of-school youth and adults. A good planning process contributes to a focused project/program that will yield measurable results.

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A PLANNING GUIDE

DEVELOPING STRATEGIES TO CONNECT INDUSTRY – EDUCATION – COMMUNITY

Introduction

The Home Builders Institute (HBI), with a 35-year history in workforce development, is dedicated to finding innovative strategies to maximize the number of youth exposed to and knowledgeable about all aspects of the residential construction industry. The goal of this effort is to engage youth in the 150+ occupations required to construct a home – occupations that range from the trades, to technical, creative, administrative and managerial positions.

Workforce Development is defined here to mean a strong commitment to education and training of youth and adults. It includes:

- Increasing industry awareness at an early age with a concentration on middle and high school students.
- Developing materials to initiate projects and programs that will lead to improved earning capacity for students and adults and put people on long-term career pathways.

For in-school youth:

Build a Home, Build a Career targets high school students to promote retention in school and enhance academic performance. The approach is two-fold: 1) to blend classroom instruction with hands-on experience and 2) to prepare youth for postsecondary life experiences.

Establishing partnerships is a fundamental component of the *Build a Home, Build a Career* concept. Creating a connection between industry, education, and community brings awareness and knowledge of the industry to educators, students, their parents and the community at large.

For out-of-school youth and adults:

The *Career Development Model* targets out-of-school youth and adults. The goal of the model is to initiate training and education programs to offer career awareness and training to unemployed or under-employed adults in the wide range of occupations in the home building industry.

To help address the continuing shortage of well-trained craft skills workers, HBI developed this training model to: 1) assist communities in partnering with local Home Builder Associations (HBAs), 2) involve the HBA membership in workforce development activities, and 3) initiate workforce development programs. The program is based on a successive training system that allows participants to obtain various skills levels in the residential construction trades and peripheral occupations through internships, classroom and on-the-job training.

The key to success when initiating a *Build a Home, Build a Career* project/program is. . .

The key to success when initiating the *Career Development Model* program is. . .



PLANNING

GETTING STARTED

1. Establish a Task Force

The purpose of the task force is three-fold. The group will:

- Explore
- Assess
- Recommend

The task force should be a select group. They will ultimately be charged with making recommendations for next steps. The group should meet for a predetermined length of time.

Suggestion: Task Force selection:

- 1) a top choice for staff is someone who will have ample time to facilitate the process
- 2) when selecting subsequent task force members choose those (from organizations/membership/community) who have a committed interest in workforce development

2. Breaking Ground – Exploring the Options

Identify areas of interest

High School Projects/Programs

Academy
Classroom Visitations
Speakers Bureau
Career Days/Job Fairs
Service Learning
Student Chapters
Summer Internships
Teacher Externships
Work-based Mentoring



Out-of-School Youth and/or Adult Program Training

Does your organization want to do a project or program?

(Definitions apply to planning)

Definitions	
PROJECT	PROGRAM
Activity with a start and finish date. Requires work to be accomplished within a specific timeframe, with specific results	Activity that is ongoing. Requires work to be accomplished with specific results, however work activity is ongoing
Staff Considerations	
Staff is able to block out a specific amount of time to devote to a project – this might be an addition to a staff persons workload responsibilities	There is sufficient staff to devote a portion of work time to managing the program – this is typically a full time position
Facility Requirements	
Typically short-term use of space, which does not involve constructing a facility – activities may take place on a construction site	Typically requires existing facility or construction of a new facility – Construction Academies utilize school property and typically have a lab
Funding Resources	
Typically funding is secured for the length of the project	Typically continuous funding is required

Who is the target audience?

Youth

- In-school
- Out-of-school (with diploma or GED)
- Special needs population (without diploma or GED)
- General

Adults

- Dislocated workers
- Special needs population
- General

What is the desired number of individuals who will be served?

Project what is thought to be a realistic number of participants. After conducting the needs assessment revisit this question to make any necessary adjustments (projections frequently change following the needs assessment).

What are the funding resources?

- Foundation/Corporate Grants
- Government Grants/Contracts
- Individuals
- Partners
- School Systems



3. Building a Good Foundation – Assessing the Need

Is there a need for this activity?

The first question is frequently, “why a needs assessment?” – followed by the statement, “we know the problem!”

Why conduct a needs assessment for your proposed workforce project/program? The needs assessment is widely defined as the “gap.” It is a process that can be used to determine what is missing between what exists and what is needed. It is used to determine such information as:

- The current climate of the community and its needs
- What is currently being offered in relationship to the proposed project/program
- The appropriate target audience
- A focus for project/program planning

It is important to assess:

- The need for the project/program
- The needs of the community
- The needs of businesses and/or organizations of proposed partners

The needs assessment format can vary. The most popular means of conducting the assessment is via a survey. You may also collect and analyze specific project/program related data, and/or develop questions for use with individual interviews or focus groups.

One of the major reasons for doing a need assessment is that it is essential to the overall planning process. When the assessment is complete it should be evident that:

- There is a need for the proposed program
- There is a committed group of partners
- There will be sufficient time and effort of partners to plan, design, develop, and initiate the proposed project/program

It is vital for the lead organization to establish their level of commitment. Ask the questions – do we have what it takes to lead the effort? Has the assessment process indicated ample staff, support to secure funds and engage volunteers?

4. Using the Blueprint – Making Recommendations

Key Task Force Recommendations:

- Based on assessment, suggest need(s) that should be addressed, including target population
- Based on backing available to support the activity, suggest project/program to be pursued, and its size
- Make suggestions for the workforce development planning team. Identify what each brings to the table

Suggestion: Dissolve the Task Force – it is suggested that the task force disband once it has completed the three-fold purpose to:

- 1) Explore the various options available for engaging in workforce development
- 2) Assess the need for the project/program
- 3) Recommend activity appropriate with the level of commitment along with partnerships to support the activity



Job Well Done!

5. Disband the Task force

MAKING THE PIECES FIT

1. Establish a Planning Team

Purpose: to establish the process and procedures for a Workforce Development Initiative

Make team selections carefully. This group will set the foundation for the planning, development and implementation of your project/program.

Define Goals, Objectives and Outcomes for the Workforce Development team

Suggestion: It is often helpful to write a team charter.

Charter Guidelines

Statement of Purpose – A one or two sentence statement identifying the charge of the team. A paragraph indicating the team's significance to the workforce development process

Objectives – List what the team is expected to do

Boundaries – List authority and any specific limitations

Team Members – Identify the team leader and members

Team Facilitator – Identify team facilitator if applicable

Timeframe – Indicate benchmark dates

Outcomes – Specify anticipated outcomes

Get any necessary approval of the charter prior to the first team meeting

2. Select a Project/Program

Use the recommendations of the task force as a guide for selecting an appropriate project/program. Their work will provide the guidelines for selecting the type and size of activity.

To further narrow the selection process, determine what purpose the project/program will achieve.

- Is there a specific problem to address and/or improvements to be made?
- Are there proposed changes with perceived benefits?

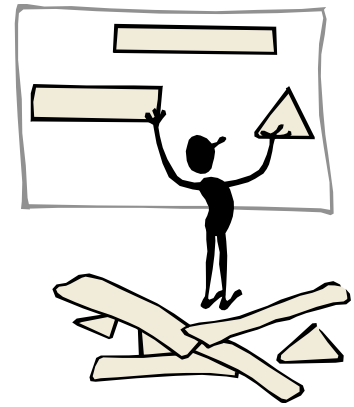
Keep in mind criteria for project/program selection can also be used as part of the evaluation tool by which the activity can be measured.

Budget Requirements

As a guide when selecting the project/program, list projected expenditures.

Facility Requirements

Address any needs for required space or a separate facility when selecting the project/program. Take into consideration the cost factor for remodeling or new construction.



Staff Requirements

If hiring new staff, be aware of coordinating the starting date with the project implementation and the funding availability.

Promotional Requirements

Once the frame is built it should be easy to match a project/program. The project/program should be suitable for the participants, beneficial to each of the prospective partners and attractive to funders.

Suggestion: Listing questions similar to those listed below will assist in the project/program selection process:

Consistency – is the activity coherent with the strategic direction identified by the group?

Relevance – what is the overall benefit of the activity? Will it produce worthwhile results?

Uniqueness – how closely does the activity duplicate like endeavors especially those occurring in proximity to the activity area?

Timeliness – will a short-term activity meet a specific need within a given timeframe? Will the benchmarks be met for an ongoing long-term activity?

Interdisciplinarity – does the activity take advantage of any interdisciplinary perspectives (specific to education activity)?

Collaboration – is the activity suitable for the proposed partnerships?

Cost effectiveness – is the cost of the activity consistent with the ability to secure funds?

Evaluation – will the activity produce measurable results?

Replication – can the activity be replicated?

Define the Project/Program Goals and Objectives

See vocabulary listing in Project/Program Design section to assist with defining goals and objectives.

Identify short-term and long-term goals (where applicable) with appropriate objectives for each category.

Evaluation

The evaluation process is critical to the success of the project/program. It is important to establish objectives with realistic and measurable deliverables.

Suggestion: The California State University, Los Angeles web site uses a very concise distinction to differentiate between the terms goal and objective:

Goals – are more global, may not be measurable

Objectives – are very specific, should be measurable

Project/Program Design

The design of the project/program has been forming all through the planning process. It is now time to apply a definite shape and the finishing touches that are most appropriate for participants and partners. To ensure that every team member understands all aspects of their roles and responsibilities related to the activity put the details on paper (or use an electronic version). Once the focus (e.g. *Build a Home*, *Build a Career* High School internship program, *Career Development Model* adult training program) of the activity for the project/program has been decided, the following steps will assist in filling in the plan.

Steps for filling in the plan:

- Start with the **goal**
- Add **objectives** appropriate for supporting the goal
- Establish **evaluation** criteria for the objectives
- Provide a **strategy** to meet the objectives
- Outline **tasks** with an action plan to accomplish each strategy
- **Assign the responsibility** of each task to Team members (and others as appropriate)
- Produce **deliverable(s)** that support the goal and objectives

Budget Preparation

The budget is an integral part of the planning process. Budget preparation hints:

- List all conceivable expenditures with an anticipated cost.
- Identify which areas are potential candidates for volunteer or in-kind support.
- Identify any confirmed funding and where it might be utilized in the project/program budget
- Identify funding prospects with projected request amounts
- Use a budget worksheet. The worksheet makes it easier to manage the project/program and align projected expenditures with activity.

Vocabulary

Goal – a broad statement of what the project/program will accomplish

Objective(s) – statement(s) describing what is needed to achieve the goal
(If applicable develop long and short-term objectives)

Evaluation – a measurable assessment of the stated objectives

Strategy – the approach that is taken to achieve each objective

Tasks – an action plan with specific detail of how the strategies will be carried out

Assigned responsibility – a document identifying specific roles & responsibilities of individuals
(Typically, partners who are not team members will also appear on this document)

Deliverable(s) – the project/program results

Once the plan is complete it should be easy to develop a Concept Paper that describes the project/program.

Suggestion: Volunteers

If the use of volunteers is key to the success of your activity, incorporate the recruitment, use, and retention strategies in the plan.

3. Partnership Development

When identifying appropriate partners for the project/program, take into consideration what each partner has to offer and how they can best utilize their expertise.



Develop Partnership Parameters

It is essential to establish parameters in which the partners are able to

- Identify clear concise roles and responsibilities
- Designate key staff to function as the partnership liaison
- Decide on required written agreement (s)
- Determine fiscal and/or donation responsibilities of partners (if applicable)

The roles and responsibilities of each partner should be consistent with the goals and objectives developed by the team.

It becomes critical to the success of the project/program that a liaison is appointed by each organization/company/school as a representative for the partner. This individual is responsible for attending meetings when required, participating in the decision making when applicable, and meeting deadlines for partnership deliverables. Entities that function in a lesser role and are not considered a partner should still have a designated contact person.

Partner Agreements

A Memorandum of Understanding (MOU) is a must with larger programs. Typically, the lead organization will develop the MOU outlining the roles and responsibilities of each entity participating in the partnership. Each partner then signs the document.

If partners are responsible for a specific monetary amount, donated materials, or a certain amount of volunteer hours, define the particulars in the MOU.



Identify Potential Funding

Knowing what will be accomplished and who is paying for it – go hand-in-hand. Typically, funds are secured from government agencies, private foundations, corporate giving programs, corporate foundations and individuals. As a rule, funds are accessed by submitting a letter of inquiry, a proposal, or a Request For Proposal. Normally funds are considered restricted and not awarded for general operating expenses. Restricted funding must be used for specific projects/programs. Generally, dollars are tied to specific line items in the budget. Starting with this premise, it becomes essential to correlate the project planning, proposal writing, and budget preparation when soliciting funds.

The team is responsible for determining the best prospects to pursue as funding sources. A good starting point is the recommendation made by the Task Force. The plan should identify fund raising as a specific task with an individual responsible for heading the effort. Partners, if not on the team, should be involved in the fund raising initiatives.

Fund Raising Hints:

- List all potential funding sources – large and small (private and public)
- List all potential industry related funders in the area
- List any potential funders that have exhibited an interest in the industry
- Compile a “who knows who” list
- Determine if /how much research is required
- Read proposal guidelines and RFPs carefully
- Determine if considerable volunteer hours and in-kind donations can be used as leverage for securing funds
- When ever possible, connect with funders to get a better understanding of what they want
- Look carefully at sustainability factors if the project/program requires continuous funding

When funds are awarded made sure the planning process has covered:

- Responsibility for monitoring fiscal and programmatic activities
- Submission of required reports
- Producing deliverables
- The evaluation process.

4. Implementation

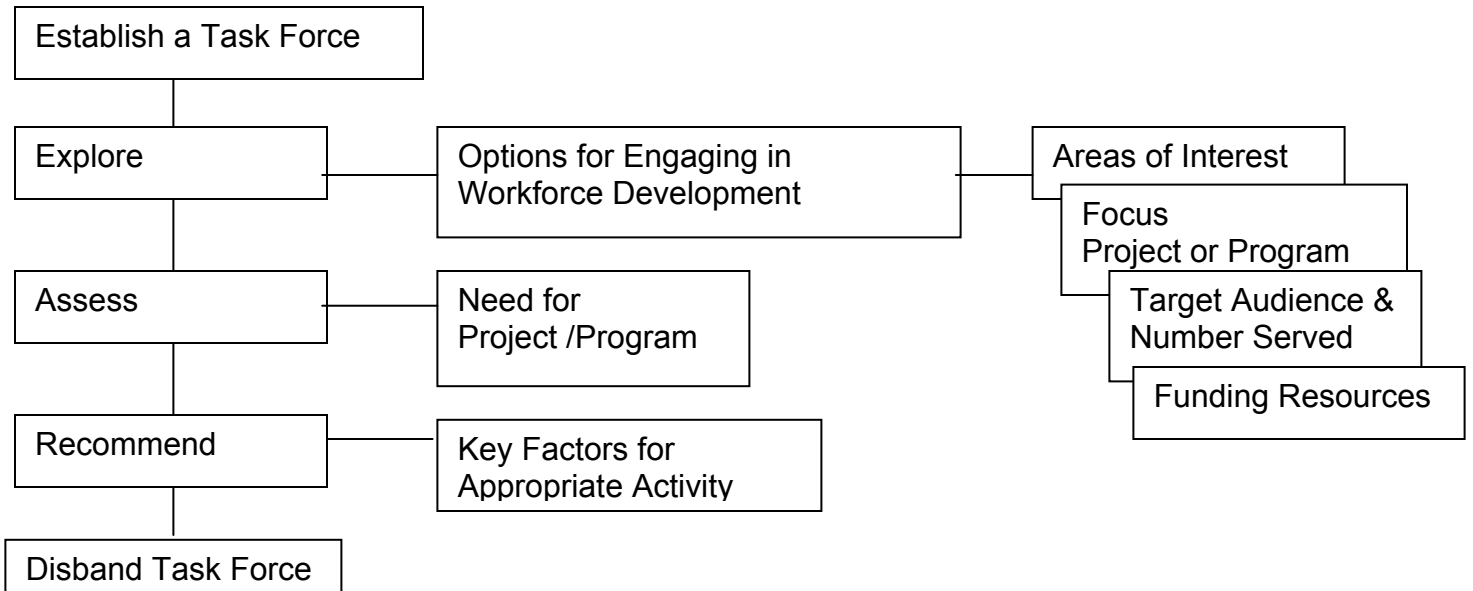
Launch Project/Program



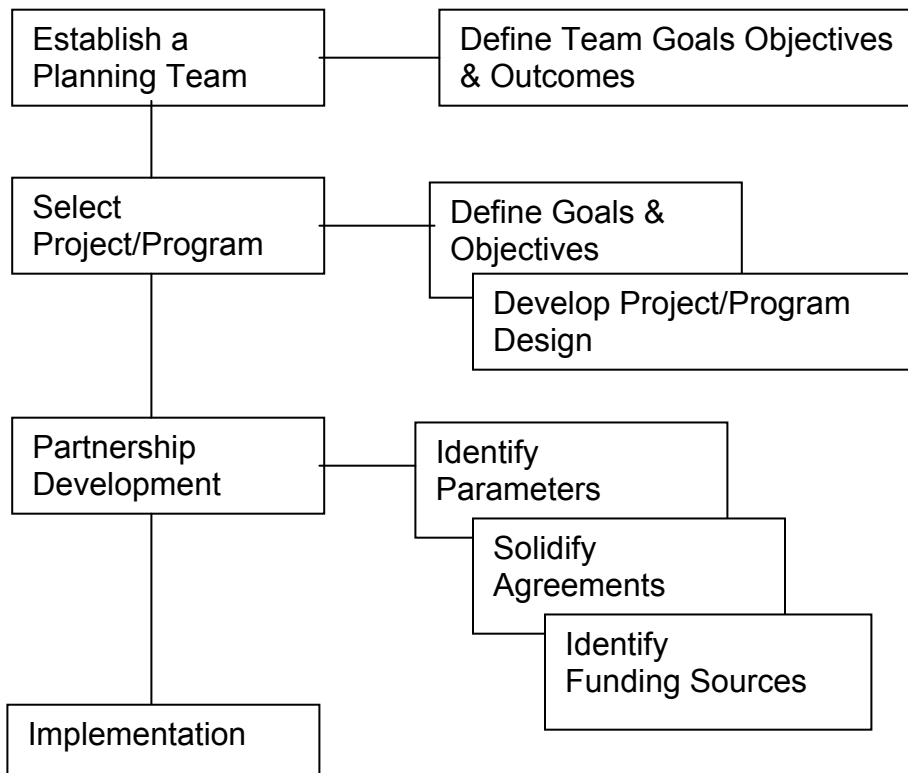
**CONNECTING
INDUSTRY – EDUCATION – COMMUNITY**

Planning Guide Flow Chart

Phase I – Getting Started



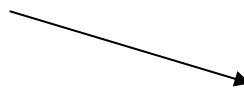
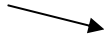
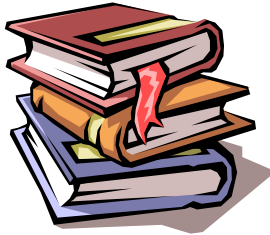
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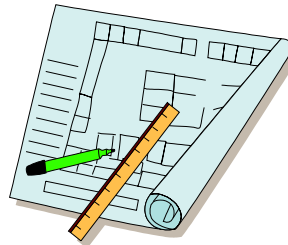
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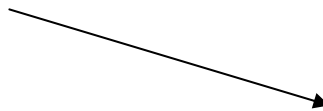
Choosing



A Career



Path



**IN THE
RESIDENTIAL
CONSTRUCTION
INDUSTRY**