

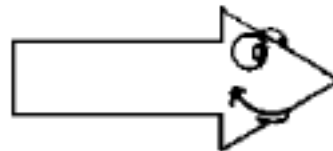
Module 1 Planning Your Program

Objectives

By the end of this module, you will be able to:

- ◆ Describe the goals of your program.
- ◆ Identify the needs of the client group you are serving.
- ◆ Develop a program model for your program.
- ◆ Develop an action plan to get your program started.

Let's get started!



Activity #1 Your Program's Goals

Consider your organization's mandate, the clients you serve and your program funder's expectations. In one sentence, what is the specific goal of your program? You can use this quick description in your program marketing and proposal writing!

Example: The goal of the Developing Enterprising Women's Initiatives (DEWI) Program is to help low income women in the Toronto area to develop the skills and confidence they need to start their own business and become economically self-sufficient.

If your organization is currently delivering or planning to deliver a self employment training program for your clients, chances are you are thinking of offering some of the services on the list below. Given the goal of your program, your current knowledge about your clients and the resources you have (and/or have access to through community alliances), which self employment services are you thinking of offering? Check them off and add any others at the bottom of the list. When you design a survey for your clients later in this module, you may want to ask them for some input into the usefulness and delivery of these services.

- General sessions on how to start your own business
- Individual self employment assessment tools
- Self assessment workshops
- Business planning workshops (business plans, finance, marketing, operations,...)
- Business management skills workshops (selling skills, time management,...)
- Personal development workshops (esteem building, personal presentation,...)
- Individual business coaching
- Business networking sessions
- Access to business resources and services (resource library, Internet, fax, office space...)
- Other:



Activity #2 Your Clients' Needs

At this stage of your program planning, you may or may not have conducted a survey of your target clients' needs. How would you generally describe the clients you will serve?

What do you still need to find out about your clients?

Examples: business skill and knowledge needs, time of day available for training, access to transportation, daycare needs, desire to start a part-time versus a full-time business.

What can you do to find out this information? You can use the action plan on the following page to help you plan your client needs assessment. Once you have done this, you will be able to design a program that meets the unique needs of the clients you serve.



- ◆ Host a networking session and distribute a survey
- ◆ Organize a focus group
- ◆ Talk to current clients in other programs
- ◆ Survey staff within your organization and at partnering agencies
- ◆ Contact organizations doing similar work



Check out the sample client survey in your toolbox!



Action Plan

Client Needs Assessment

What To Do	Who Will Do It	Deadline



Activity #3 Your Program Model

Now that you have a good idea about what your clients need, you can develop a customized model for your program. Most self employment training programs go through four phases:

Phase 1 Recruitment

To promote program and recruit clients - may include a variety of marketing activities, information sessions, and general business start-up workshops

Phase 2 Self Assessment & Selection

To help clients assess their personal and business readiness to become self employed, and to select clients into the training program – may include a series of self assessment workshops, an application package and individual interviews

Phase 3 Self Employment Training

To help clients develop the skills, knowledge and confidence to start their own business, and to develop a realistic business plan by the end of this phase – may include a combination of workshops, individual business coaching sessions, and self directed research activities

Phase 4 Business Start-up

To support clients as they start their business – may include a combination of individual business coaching sessions, group business clinics, telecoaching sessions, networking events, access to business events and trade shows, and mentorship opportunities

To get you thinking about your program, answer the questions on the next page.



What is the overall format of your training program?

What are some useful training materials you can give to clients?

What community resources can you access?

What are some innovative things you can try?

Now that you have a general idea about what your program will look like, let's turn this into a program model. What phases will your clients go through? What specific activities will you include at each phase? (# of information sessions, self assessment activities, # of weeks of self employment training, training times and days, business start-up support services, etc.) Take a look at your original ideas in Activity #1 and revise as necessary. You can use the planning worksheet on the next page to develop a program model that works best for you.



Check out the sample program model in your toolbox!



◆ Your Program Model ◆

Phase & Goals	Specific Activities	Time Lines



Activity #4 Starting Your Program

What do you need to arrange to get your program started? Review the checklist on the next two pages for some ideas, and develop an action plan. You can use the blank action plan provided at the end of this module.

Consider using community partnerships for some services. Maybe you could:



- ◆ Get a discount for your clients at a local business service centre for photocopying, fax and lamination services.
- ◆ Arrange times for clients to access computer services at a local employment centre.
- ◆ Find training space at a local library or community centre.



Check out the different toolbox sections in this program. Samples of many of the items on the checklist are provided.



◆ Program Planning Checklist ◆



PROGRAM PROMOTION

- Information package for clients and referring organizations
- Information package for potential funders
- Flyers, posters or advertisements

Information packages could include: brochure or information sheet about organization; brief program description; eligibility requirements; relevant times and dates; contact information. Consider developing hard and soft copies for mail-out, pick-up, e-mail, or web site access.

FACILITIES & EQUIPMENT

- Training room with flip chart, white board, tables, chairs
- Private business coaching space
- Staff office space
- Computers for staff
- Internet access for staff
- Computers for clients
- Internet access for clients
- Fax service
- Photocopying service
- Laminating equipment
- Business card posting area
- Business networking notice board
- Reference library

HUMAN RESOURCES

- Program Manager
- Administrative Support
- Trainers
- Business Coaches
- Volunteers



ASSESSMENT TOOLS

- ❑ Program application forms
- ❑ Blank business outline
- ❑ Self-assessment tools and exercises
- ❑ Client interview questions
- ❑ Client selection criteria

SELF EMPLOYMENT TRAINING MATERIALS

- ❑ Self-employment training curriculum
- ❑ Client workbook
- ❑ Blank business plan
- ❑ Action plan
- ❑ Sample business plans
- ❑ Client learning contract/agreement
- ❑ Dispute resolution process
- ❑ Training videos and tapes
- ❑ Reference books

BUSINESS COACHING TOOLS

- ❑ Business coaching contract/agreement
- ❑ Action plan for use at the end of each session
- ❑ Business reports for clients to submit regularly
- ❑ Journals for clients to track their own successes and challenges

ADMINISTRATION

- ❑ Client file system
- ❑ Program evaluation tools
- ❑ Management Information System (MIS) for client tracking
- ❑ Program budget management system



How Did You Do?

Before we leave this module, let's make sure you understand everything we have discussed and that you know what you need to do next. Check your progress with this quiz:

1. Can you describe the goals of your program?
Yes No
2. Do you have an action plan in place to assess the needs of your target group?
Yes No
3. Have you developed a program model for your program?
Yes No
4. Do you have an action plan in place to plan your program start-up?
Yes No

If you answered **yes** to all of the above questions, turn the page.



Congratulations!

You have successfully completed Module 1: Planning Your Program. Take a moment to review the *Food For Thought* section with *Lessons Learned* and *Discussion Questions*. Then, when you are ready, move on to Module 2: Marketing Your Program.



Food For Thought

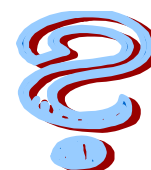
Lessons Learned



- #1 As the economy improves and people start getting jobs, you may find that clients applying to programs are the long-term unemployed, have higher life skills needs and are less business ready. A larger percentage of clients may also be receiving some form of disability allowance. A contributing factor may be the pressure for clients receiving social assistance to comply with new legislation to seek work or a recognized training program. This reality may impact your program in several ways:
- a) If you decide to work with higher need clients, your business start-up rate may be lower or slower than if your clients were more business ready. It is therefore important to be clear about measurable program outcomes and definitions of success with your funder, with staff and with the clients themselves.
 - b) The self-assessment phase may need to be longer and more intensive, which will increase the cost of program delivery.
 - c) If you decide to target more business ready clients, you will need a longer lead-time for program promotion.
 - d) If you have a wide range of business and personal readiness within your group, you will probably want to explore creative ways to deliver your program so that the needs of the individuals at both ends of the spectrum can be met with the resources you have available.
- #2 An intensive self assessment program is integral to the ultimate success of any self employment training program, and ideally should be delivered on an on-going basis well in advance of the intake process. Life skills and economic literacy training are valuable components of the self employment training curriculum.



Discussion Questions



Individually and/or with your team members, discuss the following:

- #1 Based on what you know about the target population you serve, what do you and your organization consider to be “successful” outcomes for your clients?
- #2 How does your funder measure “success”?
- #3 When planning your program, what do you need to consider so that you deliver a program that benefits your clients, fits with your organization’s mandate and fulfills your funder’s expectations?

In Your Toolbox

- ✂ Sample Program Model
- ✂ Sample Client Survey

