

BTE Strategic Planning Task Worksheet

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	TASK	ACTION ITEM	NOTES	RESPONSIBLE PARTNER	TIMELINE
PARTNER DEVELOPMENT	Confirm interest & commitment of all partners in moving forward with the BTE program	Obtain Letter of Commitment or Memorandum of Understanding (MOU) from the leadership of each of the following: <ul style="list-style-type: none"> • Institution(s) of Higher Education • Department of Education / Secondary School(s). • Other 	The school must be willing to provide Academic Data for all BTE Participants & a Comparison Group. MOUs should outline each partner's role/responsibility. <i>Tip! See BTE Website for samples.</i>		
	Determine key program contacts	Identify: <ol style="list-style-type: none"> 1. Executive Sponsor 2. BTE Champion / Volunteer Coordinator 3. Site Coordinator 4. Secondary School Contact / Academic Data Liaison 5. Higher Education Liaison 6. Other 	Full contact information should be listed on the BTE Grant Application Cover Sheet . <i>Tip! See Strategic Planning Meeting Notes for details.</i> <i>Tip! See BTE Website for template.</i>		
	Determine BTE Leadership Structure	Recommended: <ol style="list-style-type: none"> 1. <u>Strategic Planning Work Group (Steering Committee)</u> designs, plans, and launches the BTE program; it meets, as needed, during the strategic planning phase and is comprised of 1-2 representative(s) from each partner organization. The group dissolves upon proposal submission. 2. <u>BTE Advisory Committee</u> provides overall guidance and strategic advice to the BTE Management Team; it also leads sustainability efforts for post-corporate funding. The committee meets on an annual/bi-annual basis during program implementation (Year 1-Year3) and is comprised of executive-level representatives from each partner organization & community leaders. 3. <u>BTE Management Team</u> oversees implementation and all logistics for the BTE program; it meets on a monthly (or every 6-weeks) basis and each partner organization should be represented on the team. 	List name/affiliations of members in each leadership group in the BTE Grant Application Proposal Narrative . <i>Tip! See Strategic Planning Meeting Notes for details.</i>		

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TARGET POPULATION	Confirm Eligibility Criteria	Determine ideal BTE Participant Cohort Size (number of students participating in BTE): <ul style="list-style-type: none"> • Minimum: 35 • Recommended maximum: 50 students Minimum Criteria: <ul style="list-style-type: none"> • Attends the selected secondary school • Enrolled in a grade/level 3-years prior to the completion of secondary school at start of program • Submit a BTE Application Other Potential Criteria: <ul style="list-style-type: none"> • Educational • Economic 	Our ideal cohort size: Our eligibility criteria: <ul style="list-style-type: none"> • <i>Tip! See Page 6 of this document for specific tasks and actions associated with the application process, including student outreach and recruitment.</i>		
	Confirm BTE Program Application Process	Determine student application process, including outreach and recruitment mechanisms, as well as timeline.	Our application process is: <ul style="list-style-type: none"> • <i>Tip! See BTE website for sample BTE Applications.</i>		
	Confirm Participant Selection Process	BTE Participant selection is via one of the following: <ol style="list-style-type: none"> 1. 100% Acceptance 2. Random Selection (Lottery System) 	Our BTE participants will be selected by: <ol style="list-style-type: none"> 1. 100% Acceptance (< 35 applicants) 2. Random Selection Lottery System (> 35 applicants) 		
	Define Comparison Group	Comparison Group is typically identified by either: <ol style="list-style-type: none"> 1. Matched Sample (for 100% Acceptance and Criteria-Driven selections) 2. Random Selection (applicants not selected for BTE) 	Our comparison group is: <ol style="list-style-type: none"> 1. Matched Sample (< 35 applicants) 2. Random Selection applicants not selected for BTE (> 35 applicants) 		

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PROGRAM DESIGN	Finalize Program Model	Review and revise the Program Model – a one-page visual representation of the BTE program. Confirm: <ul style="list-style-type: none"> • Inputs • Program Activities • Short Term 1 Outcomes (Year 1 & Year 2) • End-of-Grant Outcomes • Secondary Outcomes 	Review and revise the draft Program Model. Include the final version of the Program Model with the grant application submission. <i>TIP! FHI 360 will provide an electronic version of the (draft) site-developed Program Model.</i>		

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GRANT APPLICATION	Draft the Proposal Narrative	Draft the Proposal Narrative; it should directly align with the Program Model, Work Plan, and Calendars of Activities, and include: <ul style="list-style-type: none"> • Issue/Statement of Need (include key economic and educational indicators) • Program Partners • Program Leadership • Target Population • Long-Term Outcomes • End-of-Grant Outcomes • Short-Term Outcomes • Program Activities (detailed description, including frequency & dosage) • Challenges to Implementation • Sustainability 	The review process is for the Proposal Narrative, Work Plan and Calendar of Activities as follows: <ul style="list-style-type: none"> • Coordinating entity prepares proposal narrative and submits draft to FHI 360 • FHI 360 reviews, sending comments and recommendations to the coordinating entity • Coordinating entity revises, if needed, and submits final proposal narrative with all required documents to FHI 360 <p><i>Tip! See Strategic Planning Meeting Notes and Sample Proposal Narratives provided by FHI 360.</i></p>		
	Develop a 3-Year Work Plan	Develop a Work Plan for <i>each</i> program year; the Work Plan should align with the Program Model and include: <ul style="list-style-type: none"> • Program Activities, including description, frequency, & dosage • Lead Partner(s) • Proposed implementation timeline 	<p><i>Tip! See the BTE Website for the following resources and templates:</i></p> <ul style="list-style-type: none"> • BTE Grant Application Guidelines • BTE Work Plan Template • Sample Calendars of Activities and Templates • Sample Budgets 		
	Develop a Year 1 Calendar of Activities	<ol style="list-style-type: none"> 1. Obtain school calendar from the Secondary School Liaison 2. Determine optimal dates/times for Year 1 BTE program activities 3. Create a detailed Year 1 Calendar of Activities, which can be distributed to all BTE Participants and volunteers. 4. Generate a tentative Year 2 and Year 3 Calendar of Activities (i.e., a simple list without specific dates) 			
	Develop a BTE Program Budget and Budget Narrative	<ol style="list-style-type: none"> 1. Develop the BTE Program Budget (3-year budget is \$90,000) that is aligned with the proposed program activities and annual grant disbursement schedule: <ul style="list-style-type: none"> • Year 1: \$40,000 • Year 2: \$30,000 • Year 3: \$20,000 2. Write the Budget Narrative or short/bulleted description of each line item, which may include: <ul style="list-style-type: none"> • Personnel • Program Activities • Supplies • Travel 			

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GRANT APPLICATION, CONTINUED	Submit the FINAL BTE Grant Application to FHI 360	Submit the following BTE Grant Application Materials to FHI 360, including: <ul style="list-style-type: none"> • Cover Sheet • Program Model • Proposal Narrative • Three-Year Work Plan • BTE Program Budget and Narrative • Calendar of Activities (e.g., Year 1 draft – final due prior to the kick-off event / Year 2 and 3 tentative) • Signed Legal Agreement (U.S. based organizations only; provided by FHI 360) • Completed Health Care Compliance Questionnaire (U.S. based organizations only; provided by FHI 360) 	The BTE Grant Application approval process is as follows: <ul style="list-style-type: none"> • The Coordinating Entity submits the full (and final) grant application to FHI 360. • FHI 360 uploads the application to Johnson & Johnson Corporate’s an online system; the Coordinating Entity will be provided with a copy of the electronic submission and grant approval notification. • Disbursement of grant by J&J Corporate (6-8 weeks following submission). 		

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STUDENT RECRUITMENT & BTE PARTICIPANT SELECTION	Develop student recruitment materials	Create, at a minimum: <ul style="list-style-type: none"> • BTE Overview / Orientation Session Presentation • Program description, flyer, or Informational brochure • BTE Application • Photo Release / Consent Forms 	All materials should be finalized at least one month prior to initiating recruitment efforts. <i>Tip! See the BTE Website for:</i> <ul style="list-style-type: none"> • <u>Sample Promotional Materials</u> • <u>Sample BTE Applications</u> • <u>BTE Photo Release / Consent Template</u> 		
	Conduct awareness, outreach, and recruitment activities	<ol style="list-style-type: none"> 1. Hold a School Orientation, informing teachers/school staff about the BTE program and eligibility requirements. 2. Recruit potential students. Sample outreach strategies include: <ul style="list-style-type: none"> • Student Orientation/Informational Sessions • Letters of Invitation to target population • Targeted Outreach by school personnel to eligible students 	Our outreach/recruitment strategies include: <ul style="list-style-type: none"> • Student Orientation/Informational Sessions • Targeted Outreach by school personnel to eligible students 		
	Select BTE Participants	<ol style="list-style-type: none"> 1. Select BTE Participants (35-50 students) using the pre-determined selection process 2. Inform all inform all applicants of final decision via letters, announcement, etc. 	Ideally, complete prior to end of school year (i.e. the school year immediately preceding program launch) <i>Tip! See Page 2 of this document for details on the BTE Participant selection process.</i>		

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EMPLOYEE (BTE VOLUNTEERS) RECRUITMENT & TRAINING	Develop BTE Volunteer recruitment materials	<ol style="list-style-type: none"> Determine the types of Volunteer Opportunities or ways employees can be engaged with the BTE program. Confirm: <ul style="list-style-type: none"> <u>Types of Opportunity</u> (i.e. Career Coaching, Guest Speaker/Presenter, Company Tour Guide, BTE Project Judge, etc.) <u>Target Number of BTE Volunteers</u> (i.e. how many volunteers are needed for each Year 1 Program Activity, such as 15-20 “Career Coaches,” 5 guest speakers, etc.) <u>Roles & Responsibilities of BTE Volunteers</u> (i.e. “job descriptions” for each type of volunteer opportunity) <u>Time Commitment / Time of Day / Days of the Week / Number of Hours</u> Create recruitment materials; at a minimum: <ul style="list-style-type: none"> BTE Volunteer Overview / Orientation Session Presentation List of BTE Volunteer Opportunities (i.e. “Menu of Options” or “Job Description(s)” that outline the roles, responsibilities, and time commitments Year 1 BTE Volunteer Calendar 	<p>All materials should be finalized at least one month prior to initiating recruitment efforts.</p> <p><i>Tip! See BTE website and the <u>BTE Communications Toolkit</u> for sample promotional materials.</i></p>		
	Conduct awareness, outreach, & recruitment activities	<p>Recruit potential Volunteers. Distribute BTE Volunteer recruitment materials listed previously. Sample outreach strategies include:</p> <ul style="list-style-type: none"> Volunteer Informational Sessions Article or feature in the local operating company newsletter Announcements (i.e. lunch table, TV monitors, computer login-screen) Individual / targeted outreach (i.e. letters, email invitations, etc.) Linking with other local company volunteer efforts 			
	Assign BTE Volunteers	<ol style="list-style-type: none"> Develop and distribute Year 1 BTE Volunteer Calendar of Activities. Obtain BTE Volunteer interests/available time Match BTE Volunteer’s interests with program activities / needs. 			
	Schedule the BTE Volunteer Training Session	<p>Work with FHI360 to organize a 4-hour training session for BTE Volunteers working with students.</p>	<p>The session is facilitated by FHI 360 and should be held during the first two months of Year 1.</p> <p><i>Tip! See the <u>BTE Site Visit Agenda Checklist</u> on the BTE Website.</i></p>		

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EVALUATION	Complete the Evaluation Agreement	<p>Develop the Evaluation Agreement, which outlines the site-specific evaluation protocol. With FHI 360, the BTE Site Evaluator, and BTE partners, confirm:</p> <ul style="list-style-type: none"> • Evaluation Key Contacts (J&J, secondary school, NGO) • BTE Identification Number (a unique identification number for BTE Participants/Comparison Group used in evaluation to ensure student confidentiality) • Academic Data collected • Timeline / Due Dates • Comparison Group 	<p>FHI 360 will facilitate a conference call with the independent evaluator and all key partners to develop the Evaluation Agreement.</p> <p><i>Tip! See <u>BTE Evaluation: Overview, Partner Roles & Responsibilities, and Evaluation Materials</u> and the <u>BTE Evaluation Agreement Template</u> (Excel spreadsheet) on the BTE Website.</i></p>		
	Select the Comparison Group.	<p>Select the Comparison Group.</p> <p>Use the input of the BTE Site Evaluator, to determine the Comparison Group size, as well as the criteria if using a matched sample.</p>	<p>The Comparison Group is determined by:</p> <ol style="list-style-type: none"> 1. Matched Sample (< 50 applicants) 2. Random Selection applicants not selected for BTE (> 50 applicants) 		
	Establish recordkeeping systems	<ol style="list-style-type: none"> 1. The Secondary School Contact: develops and maintains a master list of all students (BTE Participant and Comparison Group) with associated unique identification numbers. This list is essential for Academic Data collection and Comparison Group Survey administration 2. The Site Coordinator: develops and maintains the BTE Participant List, which will include: <ul style="list-style-type: none"> • Enrollment date • BTE Identification Number • BTE Status 	<p><i>Tip! See <u>BTE Participant List Template</u> (Excel spreadsheet), <u>BTE Participant List Instructions</u>, <u>Academic Data Template</u> (Excel spreadsheet), and <u>BTE Academic Data Instructions</u> on the BTE Website.</i></p>		
	Review BTE Surveys	<ol style="list-style-type: none"> 1. Assist the BTE Site Evaluator in customizing the common survey instruments, adding site-specific references or additional questions, as needed 2. Secure hard copies (final versions) of BTE Participant Entry Survey (Site Coordinator) and BTE Comparison Group Baseline Survey (BTE School Contact) from the BTE Site Evaluator 3. Send final versions of all surveys to FHI 360. 	<p>The BTE Site Evaluator will develop the final / customized surveys.</p> <p><i>Tip! See <u>Common Survey Instruments</u> on the BTE Website.</i></p>		

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EVALUATION, CONTINUED	Notify Parents	Inform parents of BTE Participants and individuals in the Comparison Group about the evaluation protocol if required by the secondary school.	Confirm if notification is required. <i>Tip! See Sample Parent Notification Letters on the BTE Website.</i>		
	Obtain “baseline” Academic.	The Secondary School Academic Data Liaison will: <ol style="list-style-type: none"> Gather baseline Academic Data for BTE Participants and Comparison Group; record all data in the Academic Data Template (“baseline” worksheet) by unique identification number (i.e. no student names) Email the electronic Academic Data Template file (“baseline” worksheet) to the BTE Site Evaluator 	All baseline Academic Data must be obtained within 30 days of BTE program launch. <i>Tip! See Academic Data Template (Excel spreadsheet), BTE Academic Data Instructions on the BTE Website; the BTE Site Evaluator will provide the site-specific version.</i>		
	Administer the “baseline/entry” Surveys.	As listed in the Evaluation Agreement, BTE Site Coordinator: <ol style="list-style-type: none"> Distributes the BTE Entry Survey to all BTE Participants Provides (mails or provides in person) the original copies of all surveys to the BTE Site Evaluator. The Secondary School Contact: <ol style="list-style-type: none"> Distributes the Comparison Group Baseline Survey to the comparison group cohort. Provides (mails or provides in person) the original copies of all surveys to the BTE Site Evaluator. 	BTE Entry Surveys must be administered prior to or in conjunction with the first BTE activity. <i>Tip! See Common Survey Instruments on the BTE Website.</i>		

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PROGRAM LAUNCH	Plan a BTE Kick-off Event	Organize a “kick-off” event; confirm key logistics: <ul style="list-style-type: none"> • Venue • Date / Time (check availability of J&J Corporate / local operating company executive team prior to confirming) • Agenda & Speakers • Attendees (Invite key Leadership from J&J Corporate, local Operating Company, BTE partner organizations, and broader Community) • Food • Photography • Program / Materials 	Provide tentative kick-off date to FHI 360 and Johnson & Johnson Corporate ASAP. <i>Tip! See Sample Kick-off Agendas on the BTE Website.</i>		
	Conduct Media outreach	<ul style="list-style-type: none"> • Press Release • Media Alert • Newsletter Article • Social Media (Facebook, Twitter, Blog) 	<i>Tip! See the BTE Communications Toolkit on the BTE Website.</i>		
	Obtain (and retain) parental signatures	Secure (and retain copies) parental signatures on the: <ul style="list-style-type: none"> • Photo Release • Program Participation Consent 	<i>Tip! See Sample Parent Consent forms on the BTE Website.</i>		

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