SITE

In the 6-12 months following the FHI 360-facilitated Strategic Planning Session, there’s a lot to do! Use this checklist – along with the Strategic Planning Task Worksheet – to ensure that you’ve completed all vital steps to successfully launch the BTE program. The proposed timeline is based on a typical strategic planning schedule. However, the timeframes noted below are only suggestions and planning can move quicker/slower based on local needs.

PARTNER DEVELOPMENT

Estimated Timeline: 1 month

Target Completion Date:

* Confirm interest & commitment of all partners in moving forward. Obtain Letters of Commitment or Memorandum of Understanding from:
* Secondary School(s)
* Institution(s) of Higher Education
* Other
* Determine key program contacts, including:
* Executive Sponsor
* BTE Champion
* Site Coordinator
* Secondary School Liaison and Academic Data Contact
* Higher Education Liaison
* Independent Evaluator
* Other
* Determine BTE Leadership Structure, time commitment, and list specific individuals (name and affiliation) for each of the following:
* Strategic Planning Work Group
* BTE Advisory Committee
* BTE Management Team

Estimated Timeline: 1 month

Target Completion Date:

* Confirm Eligibility Criteria:
* Determine ideal BTE Participant cohort size
* Define eligibility criteria
* Determine Recruitment & Application Process.
* Provide all Target Population materials, including eligibility criteria, cohort size, recruitment & application process, to FHI 360 within 30 days of Strategic Planning visit.

Estimated Timeline: 1 month

Target Completion Date:

* Finalize Program Model.

Tip! See the BTE Program Model Template.

* Develop a 3-Year Work Plan.

Tip! See the BTE Work Plan Template.

* Review the Program Design with FHI 360. Hold a conference call with FHI 360 within 30 days to review proposed program design and provide a planning update.

Estimated Timeline: 4 – 6 months

Target Completion Date:

* Develop the Proposal Narrative based on the final Program Model and Work Plan.

Tip! See the BTE Grant Application Guidelines.

* Produce a Year 1 Calendar of Activities:
* Obtain school calendar
* Determine optimal dates/times for Year 1 program activities
* Create a detailed Year 1 Calendar of Activities for BTE students
* Develop BTE Program Budget and Budget Narrative.
* Submit BTE Grant Application to FHI 360:
* Provide the following application materials in final draft form: Proposal Narrative, Work Plan, Year 1 Calendar of Activities, and BTE Program Budget and Budget Narrative to FHI 360 for review and comment.
* Revise application materials, as needed, based on FHI 360 recommendations to ensure grant approval by Johnson & Johnson
* Have Johnson & Johnson Legal Form signed.
* Complete Health Care Compliance (HCC) Questionnaire or undergo HCC review.
* Submit the final BTE Grant Application to FHI 360.

Estimated Timeline: 2 – 3 months

Target Completion Date:

* Develop student recruitment materials, including (at a minimum):
* 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. Tip! See sample student recruitment materials on the BTE Website.

* Conduct awareness, outreach, & recruitment activities.
* Select BTE Participants.

 Typically, this phase is completed prior to end of school year (i.e. the school year
 immediately preceding program launch)

Estimated Timeline: 2 months

Target Completion Date:

* Develop BTE Volunteer recruitment materials.
* Determine the types of Volunteer Opportunities or ways employees can be engaged with the BTE program. Confirm:
* Types of Opportunities
* Target Number of BTE Volunteers
* Roles & Responsibilities of Volunteers
* Time Commitment / Time of Day / Days of Week / Number of Hours
* Create recruitment materials; at a minimum:
* BTE Volunteer Overview / Orientation Session Presentation
* List of BTE Volunteer Opportunities
* Year 1 BTE Calendar of Activities
* Conduct awareness, outreach, & recruitment activities.
* Distribute recruitment materials listed above.
* Match BTE Volunteer’s interests with program activities / needs.
* Develop and distribute volunteer schedule.
* Schedule the BTE Volunteer Training Session (facilitated by FHI 360) for BTE Volunteers working with youth.

The session should be scheduled during the first two months of Year 1.

Estimated Timeline: 1 – 2 months

Target Completion Date: 30 days prior to program launch

* Complete the site-specific Evaluation Agreement. With FHI 360, the BTE Site Evaluator, the Site Coordinator, and the Secondary School Liaison / Academic Data Contact, confirm:
* Evaluation Key Contacts
* BTE Identification Number
* Academic Data to be Collected
* Timeline / Due Date
* Comparison Group

Tip! See the BTE Evaluation Agreement Template.

* Select the Comparison Group. Based on the recommendations of the BTE Site Evaluators and/or BTE Management Team, the Secondary School Liaison selects the comparison group.
* Establish recordkeeping systems.
* The Site Coordinator:
* Develops and maintains the BTE Participant List, recording BTE Participant name, Enrollment Date, BTE Identification Number, and BTE Status.

Tip! See the BTE Participant List Template and Instruction on the BTE Website; the BTE Site Evaluator provides the site-specific version prior to program launch.

* The Secondary School (Academic Data Contact):
* Develops and maintains a master list of all students (BTE Participants and Comparison Group), recording student name and unique identification number. This list will be essential for academic and survey data collection purposes.

Tip! See the BTE Academic Data Template and Instructions on the BTE Website; the BTE Site Evaluator will provide the site-specific version.

* Review BTE Surveys.
* Work with the BTE Site Evaluator to customize common survey instruments based on the Program Model.
* Secure hard copies (final versions) of the BTE Participant Entry Survey (Site Coordinator) and BTE Comparison Group Baseline Survey (Secondary School Liaison) from the BTE Site Evaluator.

Tip! The common survey instruments are on the BTE Website; the BTE Site Evaluator will provide the site-specific customized versions.

* Notify parents, if required.

Tip! See the sample passive consent / parent notification forms on the BTE Website.

* Obtain “baseline” academic data. The Secondary School Academic Data Contact:
* Gathers baseline Academic Data for BTE Participants and Comparison Group; record all data in the Academic Data Template (“baseline” worksheet)
* Email the electronic Academic Data Template (“baseline” worksheet) to the BTE Site Evaluator.

All baseline academic data must be obtained within 30 days of BTE program launch. Tip! See the BTE Academic Data Template and Instructions on the BTE Website; the BTE Site Evaluator will provide the site-specific version.

* Administer the “baseline/entry” surveys. As listed in the Evaluation Agreement:
* Distribute BTE Entry Survey to BTE Participants (BTE Site Evaluator/Site Coordinator)
* Distribute BTE Baseline Survey to Comparison Group (Secondary School Liaison)
* Provide (mail or provide in person) original copies of all surveys to the BTE Site Evaluator.

All baseline surveys must be administered prior to or in conjunction with the first BTE activity. Tip! The common survey instruments are on the BTE Website; the BTE Site Evaluator will provide the site-specific customized versions.

Program Launch

Target Date:

* Plan a BTE Kick-off Event. Confirm key logistics, including:
* 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, as well as BTE Volunteers, parents, and students)
* Food
* Photography
* Program / Materials

Tip! See sample program agendas and brochures on the BTE Website.

* Conduct Media Outreach. Consider developing:
* Press Release
* Media Advisory
* Newsletter/Article
* Social Media (Facebook, Twitter, or Blog)

Tip! See sample media materials on the BTE Website.

* Obtain (and retain) parental signatures on the following forms:
* Photo Release
* Program Participation Consent

Tip! See sample forms on the BTE Website.

Program Implementation

* Implement the BTE program activities

Tip! See the BTE Implementation Checklist on the BTE Website for more information