

Exploration & Cultivation Checklist

Overview

Local partners transition through four unique phases in their journey to successfully launch a BTE program in the local community:



FHI 360 – Johnson & Johnson’s BTE global management partner – provides technical assistance to all BTE sites throughout this process. The Exploration & Cultivation phase focuses on identifying and building solid partnerships to make the program a reality.

EXPLORATION & CULTIVATION (3 to 12 months)

- Phase Initiated: Johnson & Johnson Corporate (Yezenia Ramos) identifies a local operating company interested in implementing a BTE program in their community.
- First Mid-Phase Milestone: Submission of a Letter of Commitment by local operating company’s General Manager or Executive Sponsor.

Tip! See the Letter of Commitment Template

- Second Mid-Phase Milestone: Johnson & Johnson Corporate (Yezenia Ramos) RECEIVES THE Letter of Commitment from the Executive Sponsor at the local operating company.
- Phase Completed: Submission of a Letter of Intent by the selected coordinating entity.

Tip! See the Letter of Intent Template

Here are some key actions associated with exploration:

GAIN AWARENESS

- Learn about the BTE Program
 - Hold a conference call with Johnson & Johnson Corporate and FHI360
 - Review the BTE website
 - Attend the annual Alliance Building & Training Session – a professional development and network session for BTE teams from around the globe (optional)

LEARN MORE

- Organize an Exploratory Site Visit for Johnson & Johnson Corporate and/or FHI 360. The Exploratory Site Visit is generally one or two days¹ and includes the following agenda items:
 1. BTE Champion Meeting (1 hour)
 - A meeting for the BTE Champion (i.e., local operating company employee charged with launching the BTE program) to discuss next steps.
 2. J&J Executive/Leadership Team Meeting (1 hour)
 - J&J Corporate and/or FHI 360 can meet with and answer questions from the local operating company's leadership. The session will entail an overview of the BTE program, including program goals/outcomes, roles and responsibilities of the local operating company, evaluation process, and strategic planning timeline.
 3. Community Tour (1 hour per organization)
 - A short tour of the local community and/or meetings with potential/confirmed BTE partner organizations (i.e., coordinating entities), institutions of higher education and/or secondary school(s), providing a better understanding of the community, available resources, and needs of students.
 4. Interviews (1 hour)
 - Depending on the timing of the Exploratory Site Visit, consider setting up a meeting or interviewing potential coordinating entities (i.e., if potential coordinating entities have been identified and interest confirmed; see Partner Development, below, for more information).

¹ At times this visit may be conducted virtually. In those instances, there may be adaptations to the agenda. FHI 360 can provide guidance in regular check ins on the modality of the visit and any adjustments to the agenda.

COMMIT

- Have further discussion about the BTE program, including impact and roles/responsibilities with the local operating company's executive committee and confirm support of the initiative
- Submit a Letter of Commitment to Johnson & Johnson Corporate. This letter should be written by the Local Operating Company's General Manager or Executive Sponsor and addressed to Yezenia Ramos, Senior Manager, Employee Engagement, Johnson & Johnson

Tip! See the Letter of Commitment Template

PARTNER DEVELOPMENT

- Identify Potential Partners. Look at current grantees, programs, or partners of the local operating company. At a minimum, BTE programs engage the following partners:
 1. A Coordinating Entity. A Community-based Organization (CBO), Non-Governmental Organization (NGO), or institute of higher education can serve as the "coordinating entity." The Coordinating Entity manages the BTE program (i.e. day-to-day operations), taking the burden of planning and implementing from the local operating company. For US-based BTE sites, the Coordinating Entity must be a 501(c)3 organization to be an eligible BTE grant (\$100,000 over four years) recipient.

Tip! See the BTE overview PowerPoint presentation or the BTE Program Framework for a brief description of the roles and responsibilities

2. Secondary School/s. The school(s) serves students who are within their last three-years of leaving/completing secondary school (typically, 14–18-year-olds). The school will serve a disadvantaged community and ideally be within a 30-minute drive time to the local operating company.
 3. An Institution of Higher Education. A university, college or technical school with "health care and/or science" courses of study.
- Conduct an Environmental Scan. FHI 360 will:
 - Review and research the potential partners provided by the local operating company; if needed, FHI 360 will identify additional / new partners for the local operating company to choose and approve.
 - Determine eligibility of potential coordinating entities to serve as fiscal agent / site coordinator; specifically, FHI 360 will look at:
 - Organizational mission alignment with BTE
 - Organizational capacity

- Organizational interest
 - Fiscal responsibility
- Determine if identified secondary school(s) meet at least one of the following criteria:
 - Economically Disadvantaged Community. Examples include, but are not limited to:
 - Designated high poverty community
 - Higher than average % of low-income families in community
 - Educationally Disadvantaged Community, examples include, but not limited to:
 - Higher than average secondary school drop-out rate
 - Lower than average secondary school graduation rate
 - Lower than average % of students proceeding to higher education
 - Higher than average % of community without a higher education degree
 - Geographically Isolated / Rural Location
- ☐ Select the Coordinating Entity. Using the findings of the environmental scan, initiate the selection process. FHI 360 will provide guidance on the selection rubric. FHI 360 will also conduct first round interviews of the potential coordinating entities. The local operating company should:
 - Conduct interviews with one to three potential coordinating entities that will serve as the fiscal agent and site coordinator for the BTE program; if desired, FHI 360 can participate.
 - **Select the coordinating entity and notify FHI 360.**
 - **Notify all interviewed coordinating entities of final decision. (If the local operating company prefers, FHI 360 can assume this role.)**
- ☐ Select the Secondary School(s). Using the findings of the environmental scan, the local operating company in partnership with FHI 360 and the coordinating entity select the secondary school(s). Typically, this involves:
 - Sharing information about the BTE program, including impact and roles/responsibilities with the leadership of potential secondary schools. FHI 360 should participate via conference call and provide the overview.

Tip! See the BTE Overview PowerPoint presentation or the BTE Program Framework.

- Visit one or two preferred secondary schools.
- Interview leadership of each preferred school to gauge interest in / commitment to a BTE program. Note: School leadership must agree to provide academic and other data for each BTE student and a comparison group. FHI 360 should be available by conference call.

- Select the secondary school(s) and invite representatives to the strategic planning meeting.
- Notify all secondary schools of the final decision. (If preferred, FHI 360 can notify.)
- Engage an institution(s) of higher education. Specifically:
 - Visit potential institutions.
 - Share information about the BTE program, including impact and roles/responsibilities with institutional leadership. FHI 360 can participate via conference call for the overview, if needed.

Tip! See the BTE Overview PowerPoint presentation or the BTE Program Framework.

- Invite all interested institutions of higher education to a strategic planning meeting to solicit their input and gauge final commitment to the partnership.

LETTER OF INTENT

- Submit the Letter of Intent. The selected coordinating entity will submit a two-page Letter of Intent to FHI 360 with the following attachments:
 - Budget and Budget Narrative
 - Evidence of 501(c)3 status (US-based organizations only)
 - Legal status documentation (i.e.: 501(c)3, charter, trust deed, bylaws, constitution, certificate of registration) documentation
 - Latest financial report

Tip! See the Letter of Intent Template, BTE Grant Application Guidelines, and the Application Coversheet.