Work Breakdown Structure (WBS) Definitions

Programs Infrastructure and Operational Setup

1.0 Program Administration: Ensure a signed grant agreement is in place and initiate program administration, including the management of overall operations, timelines, and deliverables.

1.1 Program Launch: Execute initial setup to prepare for delivering program services.

1.2 Staffing and Hiring: Recruit and hire qualified staff. See hiring process in program manual.

1.3 Facility Set Up: Secure and prepare accessible program space to host activities and services.

1.4 Onboarding of Staff and Consultants: Train new staff and consultants on program goals, processes, and compliance. Meet with DCEO staff for additional grant and program onboarding.

1.5 Establish Partnerships and MOUs: Meet with resource partners and formalize agreements with consultants/contractual to support program delivery (if necessary).

1.6 Program Governance: Identify key decision-makers and establish roles and responsibilities of staff through the program lifecycle.

1.7 Oversight Procedures: Set up processes for internal review, accountability, and quality assurance. This can include procedures for reporting, fiscal and forms of QA/QC such as surveys.

Outreach, Compliance and Community Engagement

2.0 Policies and Procedures Manual: Develop written guidelines for all program operations. This could include an addendum to the program manual provided by DCEO that includes specifics to the host organization.

2.1 Compliance Tracking System: Implement tools to monitor regulatory and program compliance.

2.2 Outreach Strategy: Design a plan to promote the program and attract participants, community based organizations, chambers of commerce, clean energy organizations, etc., including inviting legislators to at least two events per year.

2.3 Equity-Centered Marketing Plan: Ensure that your outreach plan consistently applies an equity-focused approach.

2.4 Partner with CEJA Navigators and Workforce Network: Leverage existing CEJA partnerships to enhance outreach, recruitment, and additional engagement efforts.

2.5 Develop Promotional Materials: Create brochures, flyers, digital content, website/landing page to market the program.

2.6 Recruitment Activities: Engage communities and networks to attract participants and contractors.

2.7 Outreach Events in Equity Eligible Communities: Host in-person or virtual events in priority areas.

2.8 Develop Plain-Language FAQ for Participants and Community Partners: Provide accessible program information that can be provided to potential participants and other community partners.

2.9 Advisory Board Development: Develop an advisory board that consists of at least 7 individuals serving the region. This advisory board must meet at least once per year and provide feedback on the Incubator and needs of the region.

2.10 Develop Resource and Referral Listing: Develop a listing of federal, state and local resources to assist with capital infusion, workforce development, wraparound services, etc.

Participant Recruitment, Intake and Training Services

3.0 Recruitment of Contractors: Actively recruit small and diverse contractors that meet program qualifications for participation.

3.1 Intake and Enrollment: Establish a clear and accessible intake and enrollment process that verifies eligibility, collects required participant information, and ensures timely onboarding into the program.

3.2 Intake Form Processing: Collect and review participant information.

3.3 Eligibility Determination: Assess if applicants meet program qualifications and seek referral options if they do not.

3.4 Equity Placement Prioritization: Prioritize participants from historically underserved groups as defined in the Program Manual.

3.5 Assign Advisors: Match participants with program advisors for ongoing support.

3.6 Training, Mentorship, and Support Services: Provide targeted training, develop relationships with potential mentor companies, and wraparound support services tailored to individual and regional needs and may include business coaching, peer learning, and access to industry-specific resources.

3.7 Curriculum Development: Create a structured learning plan for contractors.

3.8 Updating WorkNet for Participant Tracking: Maintain accurate, real-time participant data in WorkNet.

Business Development, Mentorship, and Technical Assistance

4.0 Business Planning and Financial Literacy: Train participants in managing and growing a business.

4.1 Contracting and Bidding Process: Teach participants how to secure contracts and navigate procurement.

4.2 Service Delivery: Develop a comprehensive process that guides participants from intake through service delivery, incorporates ongoing communication and feedback loops, and culminates in successful program graduation.

4.3 Cohort and Individualized Training: Develop and deliver group-based and one-on-one training.

4.4 One-on-One Business Advising: Provide personalized one-on-one coaching to contractors.

4.5 Networking & Matchmaking Events: Facilitate connections between contractors and potential clients or partners.

4.6 Access to Professional Services (Legal, Finance, Insurance): Connect participants to expert service providers.

4.7 Mentorship and Technical Assistance: Pair participants with experienced mentors and offer ongoing support (where necessary).

4.8 Ongoing Technical Assistance: Develop plan for ongoing support past the scheduled cohort.

4.9 Office Hours or Drop-In TA Sessions for Contractors: Offer open, flexible support times (where necessary).

Equity, Accessibility, and Supportive Services

5.0 Preparation for Union Signatory & Certifications: Develop relationships with local unions and workforce programs and assist contractors in meeting union and certification requirements.

5.1 Access to Capital Support: Help participants find and secure funding opportunities.

5.2 Equity, Accessibility and Support Services:

5.3 Language Access (Materials & Interpretation): Offer multilingual resources and interpretation services.

5.4 ADA Compliant Facility and Services: Ensure all facilities and materials are accessible to people with disabilities.

5.5 Transportation, Childcare, and Support Referrals: Create a referral listing to connect participants to supportive services where necessary for program accessibility.

5.6 Cultural Competency: Deliver culturally responsive services and materials.

5.7 Equity Lens in Curriculum and Delivery: Integrate equity principles into all training and services.

5.8 Track and Report Support Services Usage: Monitor and document participant use of support services if a referral is provided.

Data Management, Evaluation and Impact Reporting

6.0 Collaboration with DEI-Focused Organizations: Perform outreach to and partner with organizations that prioritize diversity, equity, and inclusion in their service delivery.

6.1 Data Collection, Reporting, and Evaluation: Assign staff to manage data reporting within the CEJA Reporting System and develop methods to collect and evaluate participant feedback effectively.

6.2 Establish Data Collection Tools: Develop surveys, forms, and trackers for data gathering.

6.3 Staff Training on Data Management: Train staff to input and manage data accurately.

6.4 Participant Baseline Assessment: This assessment is to gain a comprehensive understanding of the participant’s unique needs, goals, and challenges.

6.5 Program Reporting: Submit regular reports using CEJA Reporting System on progress and outcomes.

6.6 Quarterly & Annual Reports to DCEO: Submit Quarterly & Annual PFR & PPR reports to your Grants Manager. Submit cash reimbursement requests at least Quarterly to your Grants Manager.

6.7 Equity Impact Reports: Track and report program reach and outcomes for priority populations.

6.8 Success Stories Compilation: Collect and document program success stories. Have participants sign the client release form where necessary.

6.9 Monthly Narrative Reporting: Program Lead must complete a monthly narrative report following the template in the CEJA Reporting System. Contact your Network Coordinator for more guidance.

Program Evaluation and Fiscal Management

7.0 Program Evaluation: A structure is in place to routinely assess the program's effectiveness and impact using feedback from participants, external stakeholders, your Advisory Board, DCEO, etc.

7.1 Participant Outcome Analysis: Measure participant progress and success.

7.2 Continuous Improvement Plan: Regularly refine the program based on evaluation and feedback.

7.3 Stakeholder Feedback Sessions: Gather input from participants, partners, and other stakeholders.

7.4 Fiscal Management: Identify individual in charge of financial reporting for the Program and provide this information to your Grants Manager and Network Coordinator.

7.5 Grant Budget Management: Monitor and manage program spending. See program manual for more details.

7.6 Establish Grant Accounting Procedures: Set up or identify existing financial systems specific to grant management.

7.7 Expense Tracking: Document and categorize all program expenses.

7.8 Invoice and Reimbursement: Submit timely invoices and reimbursement requests to your grants manager.

7.9 Internal Financial Controls Review: Ensure strong financial management practices are in place.

Financial Reporting and Audit Readiness

8.0 Monthly Financial Reports: Prepare detailed spending summaries with supporting documentation and time and effort forms and send to Grants Manager for reimbursement.

8.1 Quarterly Financial Statements: Submit comprehensive quarterly performance financial reports (PFR).

8.2 Annual Audit Preparation: Get financial records ready for annual audits.

8.3 Document Retention Plan (Digital and Physical): Maintain proper records for required periods.

Close-out and Sustainability

9.0 Develop Grant Closeout Plan: Prepare for the orderly shutdown of the grant if needed.

9.1 Final Report to DCEO: Submit a complete summary of activities and financials at the end of the grant period.

9.2 Retention of Final Financial Records and Documentation: Safely store records for at least 3 years for audit and compliance purposes.

9.3 Sustainability Strategy or Transition Plan: Plan for ongoing program delivery or closure after grant funding ends.

9.4 Partnership Continuation or Transition Strategy: Plan for continued or adjusted partnerships.

9.5 Debrief with Staff, Partners, and Participants: Conduct formal performance reviews to identify successes and challenges.

Year 2 Readiness and Reapplication

10.0 Conduct Year 1 Program Self-Assessment (Performance and Fiscal): Evaluate and document internal performance and financial management.

10.1 Identify Lessons Learned and Program Adjustments for Year 2: Document insights and proposed improvements.

10.2 Draft Year 2 Scope of Work and Deliverables: Outline updated activities and goals for Year 2.

10.3 Update Budget and Staffing Plan Based on Year 1 Experience: Adjust resource plans based on lessons learned.

10.4 Submit Required Data and Performance Metrics to DCEO: Input any outstanding reporting to the CEJA Reporting System.

10.5 Engage Participants and Stakeholders for Feedback/Input: Include community and participant voices in planning.

10.6 Finalize Year 2 Application Narrative and Attachments: Complete the application and required documents for continued funding.

10.7 Submit Year 2 Application to DCEO: Deliver the application on time.

10.8 Prepare for Follow-Up Questions and Clarifications from DCEO: Be ready to respond to DCEO inquiries.

10.9 Transition Plan if Not Funded for Year 2: Develop a plan to wind down or sustain program without additional funding.