



**Part 4:**  
**Planning and Piloting the Program You Have Chosen**

**Date:**

**Organization:**

**Submitting Personnel:**

**Name:**

**Role/Title:**

**Name:**

**Role/Title:**

Now that you have identified a specific program or service area that you want to work on as an organization, this part of the Organizational Assessment is designed to help you think through a detailed planning process.

**Who should be included in the planning process?** (Who needs to “buy in”? Who has the knowledge, skill, talent, or resources to help your program/service be successful?)

## Planning Phase

**Program/Service Description** - What is the program/service you are offering?

**Program/Service Goal(s)** - What do you want to accomplish with this program/service?

**Target Population** - Who will be served by the program/service? Consider income, geography, type of caregiving support needed, characteristics of person receiving care, number to be served by program, duration of contact with program/service.

**Resources Needed** (start-up costs, infra-structure needs, ongoing staffing, number of personnel and training/credentials needed, ongoing financial support, marketing)

**Time Frame for Implementation** - When will the program/service be implemented and for how long? Working backwards from your target date for serving your first caregiver, develop a detailed timeline. Identify the list of activities/tasks that need to be accomplished in order to meet your goal(s) and the timeframe of those activities. Identify the person in charge of each task.

Goal	Activity/Task	Timeline	Lead

**Evaluation Planning** - How will you know if you are providing a quality service/program?

**What outcome measures will be examined?** - What do you hope caregivers will learn or gain from using your program/service? How will you know if the program/service is successful?

**Data Collection** - What data will you collect to evaluate program performance? How will you collect program data? (e.g., surveys, questionnaires, focus groups, interviews)

**Quality Monitoring** - What quality measures have you included in your program/service design?