PRACTITIONER RESOURCE #9: GENERIC GRANTEE WORK PLAN

STEP	WHO?	ACTIVITIES	TIMELINE	RESOURCES/TOOLS
PHASE I: Foundation building				
Work planning for research process	Manager	• Clear workplan, timelines and allocation of responsibilities	May 2005	• Work planning tools to be provided by Eko Nomos at the grantee workshop
Build local Support for research, learning and analysis	Manager	• This is optional • Establish research steering committee or team (RSC) • The committee or team would work together to ensure that the research unfolds smoothly while also looking at the overall organization's system and process for the collection of outcomes information	May 2005	• See 1.6 Building local Support for Your Research Process
Select practitioner/ researcher (P/R)	RSC	• Discussion with Eko Nomos re: best approach for each site • Appointment of existing staff preferred • Hiring process if necessary	Summer of 2005	• Description of roles and responsibilities of all research team members (Introduction)
Establish process for documenting livelihood assets during the program	Program staff and P/R	• All participants in research intake oriented to Sustainable Livelihoods concepts, language and tools • Establish confidentiality process and protocols	At the beginning of the formal component of your program For SPEs at the commencement of employment	• SL introductory workshop plans Section 2.1: Documents 2.2.1, 2.2.2, and 2.2.3 • Participant asset-mapping tools and resources Section 2.4
Grantee Deliverables		• An implementation plan and timelines for the research • Clear roles and responsibilities for the research • A plan for integrating sustainable livelihoods and data gathering into training/consulting for the research intake • Strong systems for organizing and storing information, and protecting confidentiality		

STEP	WHO?	ACTIVITIES	TIMELINE	RESOURCES/TOOLS
PHASE 2: Participant tracking and asset mapping				
Collect participant Intake information		• Collect demographic and baseline statistics for all women who have been selected to participate in the "Research Intake".		• See Document 2.1 Collecting Baseline Information • See 3.1 Baseline data collection form
Participant asset mapping during program	Program staff	• Participant asset-mapping completed twice for all participants in the intake to include: • Asset map • Statement of asset goals	Map 1: Within 2 weeks of participants' entry to the program Map 2: At the point of exit from the formal/training component of the program	• See 3.2 – Participant Asset Mapping tools
Introduction to the Portrait Research Process – group information session	Program Staff P/R	• Recruit women who are interested in participating in the portrait research process • Organize an information session for all participants from your fall intake while they are still actively involved in your program • Interested participants sign sheet	During the formal component of your training or early stages of SPE employment Before participants leave formal program Latest – October 2005	• Section 1.4 – Recruiting and Selecting your 12 Portrait Research Participants • 1.5.1 Interview Consent Form
Set up case note taking process for 12 (self-employment research participants)	P/R	• Decide who will keep the notes • Establish follow-up consulting workplan and timeline	Before the end of formal component of the program	• See 3.3 A & B Case Notes About the Participant's Business
Selection of the 12 outcomes research participants	P/R	• Review list of interested participants with Eko Nomos • Select group of 12 participants who reflect the diversity of your target population • Have participants sign contract and complete contact information	Before participants leave formal program Latest – October 2005 Complete participant management spreadsheets (Excel)	• Section 1.4 – Recruiting and Selecting your 12 Portrait Research Participants • 1.5.1 Interview Consent Form • Section 1.5 – Tracking the 12 Research Participants = Participant management spreadsheets (Excel)

STEP	WHO?	ACTIVITIES	TIMELINE	RESOURCES/TOOLS
PHASE 2: Participant tracking and asset mapping *(cont'd)*				
Write case notes	Consulting staff	• Case notes written, summarizing interventions with participants, assessment of progress with employment/business • Record timing of final consultation and case note writing in participant management spreadsheets (Excel)	Case notes completed for each of the 12 participants before end of consulting relationship Minimum of 3 months after the end of the formal training approx. Jan/Feb 2006	• See 3.3 A & B Case Notes About the Participant's Business
Grantee Deliverables		• Baseline statistical data form at entry to the program (completed for all participants in the intake) • Baseline participant asset maps (to be completed by all participants within two weeks of starting the program or entering the business) • End of training participant asset maps (to be completed just before the end of the formal training program or after about two months of participation in the business by all participants who are still involved) • Business assessment case notes (for self-employment only; to be completed by consulting staff at the end of the consulting/"after care" phase for the 12 participants selected for the portraits)1		

[1] "Consulting staff" refers to program staff who are responsible for providing ongoing technical assistance and business development support to participants.

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PHASE 3: Participant portrait interviews and ongoing analysis				
Set up first round of 12 interviews	P/R	• Contact all portrait research participants and set up interviews • Book a quiet, private space for the interviews • Remind them of the $30 honorarium	Before attending CWF meeting, May 2006	
Participate in CWF Collaborative Fund Grantee Meeting	Manager P/R	• Attend pan-Canadian gathering to analyse baseline data, assess progress to date • Workshop to support P/Rs to do the interviews and follow-up analysis	May 2006	• 3.5 Participant Portrait Interview Guide
Conduct interviews	P/R	• Interview each of the selected participants using the interview guide (max. 2 hours) • Finalize interview stats and processing	May /June 2006	• 3.5 Participant Portrait Interview Guide
Process and Analyse results	P/R	• Use tools to process and summarize qualitative and quantitative information	June 2006	• Research summary and analysis tools (to be finalized)
Discuss local results	P/R RSC	• Organize a meeting to explore results and feed into program development	Summer 2006	
Repeat interview process	P/R RSC	• Do a second interview with the same 12 participants • Analyse and process portraits	Spring 2007 Before May meeting	• 3.5 Participant Portrait Interview Guide
Grantee Deliverables		• Two in-depth participant portraits produced and summarized for each of 12 participants providing snap shots of how their lives have changed since their involvement in the program		