

Attachment C: Grant Management Planning Guidance – Period of Performance

Model 1: 24-Month Period of Performance

Capacity Building / Single Limited Action Program

This model is designed for **infrastructure development, pilot initiatives, or system-building efforts** with limited or no direct participant enrollment.

Phases Overview

Months	Phase	Activities
1–6	Planning & Capacity Development	No or minimal participants
7–18	Implementation / Limited Action	Pilot activities, small-scale service delivery
19–24	Closeout & Sustainability	No new participants

Phase 1: Planning & Capacity Development (Months 1–6)

(Required for capacity-building projects; participants typically not enrolled)

Months 1–3 (Ramp-Up Period – Required):

During the first three months, grantees must complete all start-up and system access requirements necessary to ensure full grant implementation. This ramp-up period is critical to establishing operational readiness.

Required Activities (Months 1–4 priority):

- ☐ Obtain access and complete registration for required federal systems, including:
 - Payment Management System (PMS)
 - Workforce Integrated Performance System (WIPS)
 - GrantSolutions
- ☐ Ensure staff are trained on system use, reporting requirements, and compliance expectations
- ☐ Establish internal controls for financial management, reporting, and data entry
- ☐ Resolve all Conditions of Award (COAs), if applicable, within the required timeframe to ensure full programmatic and administrative compliance
- ☐ Attend required onboarding and orientation sessions with the assigned Regional Federal Project Officer (FPO)
- ☐ Develop and/or procure data management systems and reporting infrastructure capable of capturing participant- and program-level data aligned with the PIRL (Participant Individual Record Layout) framework, as applicable to CP grantees

- ☐ Define data collection procedures, validation protocols, and reporting timelines to ensure accurate and timely submission of performance data through WIPS or other designated systems

Additional Phase 1 Activities (Months 1–6):

- ☐ Hire and onboard core project staff and/or consultants
- ☐ Finalize partnerships and execute MOUs (e.g., workforce boards, community-based organizations, employers)
- ☐ Establish governance structure and project management systems
- ☐ Refine budget, including infrastructure and administrative costs
- ☐ Conduct needs assessments and asset mapping
- ☐ Develop program design, service delivery framework, and performance metrics
- ☐ Procure equipment, technology, or facility improvements (if applicable)
- ☐ Develop outreach, communications, and participant recruitment strategies (if limited services will occur)
- ☐ Design and test tools (e.g., intake forms, case management systems, tracking spreadsheets or databases) to capture required PIRL data elements, including demographics, services received, outcomes, and follow-up information

Phase 2: Implementation / Limited Action (Months 7–18)

(May include pilot or small-scale programming; limited participant enrollment permitted)

Key Activities:

- ☐ Launch pilot programs, demonstrations, or system improvements
- ☐ Deliver targeted services (e.g., workshops, short-term training, technical assistance)
- ☐ Test new service delivery models or partnerships
- ☐ Strengthen organizational and partner capacity through training and technical assistance
- ☐ Begin data collection and performance tracking
- ☐ Conduct continuous quality improvement and program refinement
- ☐ Engage employers and community stakeholders
- ☐ Conduct a mid-point check-in (approximately Month 12) with the Regional FPO to review program progress, performance data, and implementation status
- ☐ Implement ongoing data collection and entry processes aligned with PIRL requirements (as applicable), ensuring participant-level and activity-level data are consistently captured

- ☐ Conduct routine data validation, quality assurance checks, and staff training to maintain data integrity and compliance with federal reporting standards
 - ☐ Generate periodic internal performance reports to assess progress toward outputs and outcomes and inform program improvements
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Phase 3: Closeout & Sustainability (Months 19–24)

(No new participant enrollment; focus on outcomes and long-term viability)

Key Activities:

- ☐ Evaluate program outcomes and document lessons learned
- ☐ Finalize performance reporting, data validation, and compliance requirements
- ☐ Develop sustainability and replication plans
- ☐ Institutionalize partnerships and systems developed during the grant
- ☐ Secure additional funding or braided resources
- ☐ Disseminate results and best practices to stakeholders
- ☐ Provide limited follow-up or seek technical assistance as applicable
- ☐ Ensure all required participant and program data are complete, validated, and submitted in accordance with PIRL-based reporting requirements (as applicable)
- ☐ Document data systems, reporting processes, and tools developed for potential replication or integration into ongoing organizational operations

Model 2: 36-Month Period of Performance

Direct Training and Employment Program

This model is designed for **full-scale participant training and workforce development programs**, aligned with TEGL expectations for enrollment, service delivery, and follow-up.

Phases Overview

Months	Phase	Activities
1–6	Planning & Start-Up	No participants enrolled
7–30	Active Training Program	Participants enrolled
31–36	Follow-Up & Closeout	No new participants

Phase 1: Planning & Start-Up (Months 1–6)

(Participants are not enrolled until core requirements are met)

Months 1–3 (Ramp-Up Period – Required):

During the first three months, grantees must complete all start-up and system access requirements necessary to ensure full grant implementation. This ramp-up period is critical to establishing operational readiness.

Required Activities (Months 1–4 priority):

- ☐ Obtain access and complete registration for required federal systems, including:
 - Payment Management System (PMS)
 - Workforce Integrated Performance System (WIPS)
 - GrantSolutions
- ☐ Ensure staff are trained on system use, reporting requirements, and compliance expectations
- ☐ Establish internal controls for financial management, reporting, and data entry
- ☐ Resolve all Conditions of Award (COAs), if applicable, within the required timeframe to ensure full programmatic and administrative compliance
- ☐ Attend required onboarding and orientation sessions with the assigned Regional Federal Project Officer (FPO)
- ☐ Develop and/or procure case management and data tracking systems capable of capturing all required PIRL data elements for participant-level reporting
- ☐ Establish policies and procedures for data entry, validation, documentation, and reporting to ensure compliance with federal performance reporting requirements

Additional Phase 1 Activities (Months 1–6):

- ☐ Hire and onboard core staff (Program Director, Case Manager, Job Developer, Trainers, etc.)
- ☐ Finalize MOUs with Workforce Development Boards, American Job Centers, and partners
- ☐ Establish employer partnerships and work-based learning sites
- ☐ Update and finalize budget, including infrastructure contributions
- ☐ Develop detailed training curricula and service delivery plans
- ☐ Procure training equipment, materials, and facility access
- ☐ Launch outreach and recruitment strategies
- ☐ Establish data systems and performance tracking protocols
- ☐ Reconfirm funding commitments and partner roles
- ☐ Develop and test intake, eligibility determination, case management, and follow-up tracking tools aligned with PIRL data elements (e.g., demographics, barriers to employment, services, credentials, employment outcomes)

Phase 2: Active Training Program (Months 7–30)

(Required phase with participant enrollment and service delivery)

Key Activities:

- ☐ Enroll participants into one or more cohorts
- ☐ Deliver integrated services, including:
 - Education and Foundational Skills
 - Occupational skills training and work-based learning
 - Leadership development, career readiness, or supportive services
- ☐ Provide case management and supportive services
- ☐ Facilitate work-based learning, apprenticeships, or employer placements
- ☐ Track participant progress and outcomes in real time
- ☐ Maintain employer engagement and placement pipelines
- ☐ Conduct ongoing program evaluation and continuous improvement
- ☐ Conduct a mid-point check-in (approximately Month 18) with the Regional FPO to review program progress, performance outcomes, and compliance status

- ☐ Ensure comprehensive, ongoing collection and entry of participant-level data in alignment with PIRL requirements, including services received, measurable skill gains, credentials attained, and employment outcomes
- ☐ Conduct regular data validation, monitoring, and quality assurance reviews to ensure accuracy, completeness, and timeliness of reporting
- ☐ Submit required performance reports through WIPS (or designated system) in accordance with federal reporting timelines
- ☐ Use data to inform program management, including cohort performance, service effectiveness, and outcome achievement

Program Structure Guidance:

- Participants should receive structured training lasting **several months up to 24 months**, depending on program design
 - Programs should balance classroom instruction and hands-on experience
 - Multiple cohorts may be staggered throughout this phase
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Phase 3: Follow-Up & Closeout (Months 31–36)

Key Activities:

- ☐ Provide follow-up services for all exited participants (up to 12 months where feasible within grant timeline), including:
 - Job retention support
 - Career advancement assistance
 - Continued education or training support
 - Employer engagement and check-ins
- ☐ Track and report outcomes (employment, retention, earnings, credentials)
- ☐ Conduct data validation and performance reporting
- ☐ Document program outcomes and lessons learned
- ☐ Support participants in transitioning to unsubsidized employment or further education
- ☐ Finalize grant reporting and compliance requirements
- ☐ Provide limited follow-up or seek technical assistance as applicable
- ☐ Develop sustainability strategies and transition plans
- ☐ Ensure all participant records are complete and all required PIRL data elements are reported, including follow-up outcomes such as employment status and retention
- ☐ Reconcile data across systems (case management, WIPS, internal tracking tools) to ensure consistency and accuracy prior to final submission.