

Encore Fellowships Program Creation Guide

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A PARTNER
PROGRAM OF **The**
Encore Fellowships
Network™ POWERED BY
CIVIC VENTURES®

Welcome!

We created this guide to make it as easy as possible for you to create an effective Encore Fellowships program that will contribute directly to your organization's mission. In addition to the frameworks and recommendations contained in this paper, you'll find references to additional resources available in the online Program Operator Wiki. We hope you find this guide to be a useful tool as you design, create, and launch your own Encore Fellowships program.

The Program Creation Process

This guide starts with an **Overview of Encore Fellowships** and an explanation of the **Core Programs designation**. The rest of the Guide covers the five phases of program creation:

Phase 1 - Create a Concept Brief

Create a top-level definition of the program, including the following key elements: the overall purpose of the program, likely participants, social issues addressed, source of the fellows and the work hosts, and the primary terms of the fellowship. Use the Concept Brief to obtain support from your organization's management and from likely stakeholders.

Phase 2 - Develop a full Program Plan

Define the necessary components and activities in a working program. In this phase you choose the target size, structure and terms of the program; make a plan for how to recruit and match fellows and organizations to host them; outline program administration tasks and resource requirements; identify other partner organizations; create a budget; and define a high-confidence funding model.

Phase 3 - Prepare the program for launch

Create a project implementation plan with a task timeline and clear ownership. Complete any desired customization of marketing materials, forms and tools. Hire or assign staff and provide them with proper training.

Phase 4 – Recruit, select and match

Reach out to prospective fellows and work hosts, inviting them to apply to the program. Screen the applicants, create match options for their review, facilitate matching interviews, and certify final mutual matches. Prepare any necessary training and orientation for the incoming cohort.

Phase 5 – Operate the program

Facilitate successful on-boarding of fellows into their assignments. Provide on-going cohort enrichment opportunities and program evaluation tools. Offer intervention support if needed.

We wish you all the best in your program. If you have any questions or feedback about this material, please contact us at info@encorefellowships.net.

A. Overview of Encore Fellowships

What are Encore Fellowships programs?

Encore Fellowships bring significant new sources of talent to the task of solving social problems. These fellowships are structured programs that place highly-skilled, experienced professionals at the end of their mid-life careers into social-purpose organizations, where the fellows take on roles that deliver significant, sustained impact to their host organizations. During the fellowship period (typically 6-12 months, half- to full-time), fellows earn a stipend, learn about social-purpose work, and develop a new network of contacts and resources for the future. For more general information about encore careers and about Encore Fellowships, visit encore.org.

Who Benefits?

Encore Fellowships are designed to bring significant value to all participants:

- *Communities* benefit directly by the impact of the fellows' work, and by the fellows' future engagement in the social sector
- *Program sponsors* may benefit in a variety of ways: through deeper member or employee engagement, community engagement, market engagement, and improved grantee effectiveness
- *Work hosts* gain affordable, low-risk access to experienced, skilled talent as they transition into the social sector
- *Encore fellows* are able to create a flexible, experiential pathway to social-purpose work and to make an immediate impact using the skills and experience they already have.

Key Roles in an Encore Fellowships Program

In addition to the fellows and their work host organizations, programs normally also have a single Program Operator and one or more other organizations that provide financial sponsorship or other support.

- Overall program leadership might come from the *Program Operator* or from a sponsor, which might be a nonprofit or foundation, a corporation, an alumni or professional association
- *Financial sponsorship* could come from business organizations, foundations, or government funding
- *Program administration* might be by the Program Operator or by a nonprofit or community foundation contracted by the program owner. Approved core Encore Fellowships programs have access to the Encore Fellowships Network online database and operator tools, which make the program administration tasks very straightforward.

Core Program Elements

We have identified the following core elements of effective Encore Fellowships programs.

- *High-impact social-purpose work.* The mission of the EFN is to bring new talent to social-purpose organizations in direct support of their work. Fellows are expected to bring significant transferable skills to their assignments.
- *Rigorous recruitment, selection and matching.* We believe that the most critical ingredient for an effective Encore Fellowships program is a thoughtful and well-managed process to select and match fellows and the organizations that host them. The process should include targeted outreach to participants, quality assessment of skills and skill needs, and high-involvement matching activities.
- *Work host readiness and leadership.* Organizations that host fellows will gain most from the fellowship if they have the leadership, commitment and capacity to host a high-impact work assignment. Strong executive sponsorship for the fellow will provide clear

organizational buy-in to the work and will provide access to personnel and resources to support the fellow's work and development.

- *Compensation and value.* We designed Encore Fellowships with modest financial stipends for several important reasons: financial compensation reinforces the expectation of commitment to the work assignment by all parties, while the below-market rate makes participation easier and lower-risk for work hosts and enables fellows to transition smoothly into a new sector.
- *Flexible but significant work schedule.* The fellowship period should be long enough to allow for high-impact contributions to the host organization, but can also offer the schedule flexibility that Encore Fellows typically value during their fellowship. We recommend fellowships of 6-12 months with work schedules ranging from 20-40 hours per week.
- *Experiential learning and pathways to encore careers.* During the course of the fellowship, fellows will gain hands-on experience in their host organization, they will learn more broadly about social-purpose work, and they will develop a new network of contacts and resources for the future.

What is the Encore Fellowships Network?

Civic Ventures, the innovative force behind the original 2009 Silicon Valley Encore Fellows program, has now created a new social venture - the Encore Fellowships Network (EFN) - whose purpose is to make it as easy as possible for organizations to start, sponsor and operate effective Encore Fellowships programs of their own. The EFN provides a wealth of online information, tools and communities that make the design, launch and operation of an Encore Fellowships program as simple and efficient as possible.

B. The Encore Fellowships Core Program Designation

Why we designate "Core Programs"

While we make significant information and other resources available to the general public, we also reserve certain entitlements for designated “*Core Encore Fellowships Programs*”. We do this to encourage program sponsors and operators to design programs that meet standards for Encore Fellowships programs that will preserve the brand position and intended social impact of this initiative.

Core Programs criteria

We have established specific criteria around the core program elements described in the previous section (see the *Core Encore Fellowships Program Document*). In addition to the core elements, the Core Programs approval process ensures that the following program attributes are also in place:

- mission alignment between the proposed program and the host organization
- level of board support for the program
- integration of the host organization with the target social-purpose community
- operational capacity (both financial and human capital) to run a program
- policy and practice of non-discrimination of program participants based on race, sex, religion, nationality, disability, sexual orientation or age.

Entitlements for Core Programs

Core programs have access to resources in the following four categories:

1. Program materials and events
 - a. Standard templates and boilerplate language, use of the EFN logo and the designation “Partner Program of The Encore Fellowships Network”
 - b. Source files of EFN brochures, videos, media reprints and announcements that can be used as is or customized to fit the needs of the program
 - c. Membership in the EF Programs Community and invitation to special events
2. Software tools and reports
 - a. Program Design Guide, Resource Library with sample forms, Community, Wiki
 - b. Program Operator online application, matching, program operation and program evaluation system (EFMatch system)
 - c. Program Evaluation reports including comparisons to aggregate EFN data
3. Referrals
 - a. Access to select Fellow and Work Host applicant data from the EFN central database
 - b. Core programs are considered for EFN-coordinated sponsorships
4. Custom services (contracted individually)
 - a. Program design and creation consulting through the EFN team
 - b. Program subcontracted operations services through the EFN team (Recruit, Select, Match, Launch, Curriculum, Survey)
 - c. Customization of marketing collateral
 - d. Access to Civic Ventures-operated programs’ Fellows, Work Hosts, and EFN staff for appearances or informal consultation

The Core Program Designation Process and Timeline

The EFN team is available to work with program creators during the design process. We want to encourage program creators to design within the established criteria, and to offer them reasonable assurance that they can count on specific EFN entitlements when they launch their program. Core EFN programs will normally pass through the following three stages:

1. Any prospective program-level participant may be invited to join the EF Programs Community and have on-going access to community events and resources. At some point programs may request program design services from the EFN team, which is contracted on an individual basis.
2. Once they have a board-approved concept brief, a program may request a design review with the EFN national director. Following a successful review, we will issue an MOU (attached), and approve the use of EFN marketing materials and the EFN logo to support their effort to create a core EFN program.
3. When the final program plan is in place, programs submit a formal application (attached) for Core Program status. Once this is granted, they are provided with an EFMatch portal and the associated online forms and documentation, as well as user training. They are then eligible for referrals and the other custom services.

Note: Core program status is reviewed annually, but may be rescinded at any time if the actual program moves them outside the specified parameters or fails to meet quality and financial sustainability expectations.

C. The five-phase program creation model

Phase 1 - Create a Concept Brief

Create a top-level definition of the program, including the following key elements: the overall purpose of the program, likely participants, social issues addressed, source of the fellows and the work hosts, and the primary terms of the fellowship. Use the Concept Brief to obtain support from your organization's management and from likely stakeholders.

The objective in phase 1 is to define the program concept so that it can be shared with potential partners or participants. We recommend that you begin the design process by creating a simple Concept Brief that includes five elements:

1. State your primary purpose in creating an Encore Fellowships program
2. Recommend who will lead the program, and how each of the top stakeholders will participate in and benefit from the program
3. Define the social issues and/or hosting entities the program will target
4. Define the fellow profiles the program will target
5. Outline the top-level terms of the fellowship

Step 1: State the purpose of the program

Why might your organization want to create, sponsor or operate an Encore Fellowships program? How would the program align with and support the mission of your organization? How could Encore Fellows offer a unique source of talent to apply to problems you confront? You might also describe the primary outcomes you are hoping to achieve through the program, and how these align with your organization's theory of change. Finally, make it clear if your program will be defined around a particular social issue, geographic location, source of fellows, or group of work hosts.

Some examples:

- a. a corporation wants to give departing employees an additional career option;
- b. a foundation wants to supplement their cash grants with high-leverage grants of “human capital”;
- c. a community group wants to inject a new source of capacity-building talent into their non-profit community;
- d. an organization providing services to social-sector institutions (e.g., school districts, local governments) wants to add a new, powerful and affordable component to their workforce;
- e. a membership organization (e.g., alumni association, professional association) wants to engage their members in new and meaningful ways.
- f. a corporation wants to engage more deeply with target markets in the social sector

Step 2: Identify the key stakeholders, and describe why they might want to participate

First, the leader: although many organizations may participate in and benefit from an Encore Fellowships program, typically one organization takes the clear leadership role. The leader sets the vision and key operating parameters for the program, recruits other stakeholders, provides or lines up funding, and may lend their brand to the initiative. In some cases the leader will also operate the program.

Every Encore Fellowship program will have some combination of four stakeholder roles: the fellows, the organizations that host the fellows, the program operator, and program sponsors or funders. Be prepared to explain to potential participants from each of the groups, in one or two

sentences, the primary reasons for participating in this initiative. Then go out and engage representatives of each target group to test your propositions and to assess potential interest and leadership commitment.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- *EF Program Roles and Functions*, an overview of the four stakeholder roles and the primary functions of each one.
- *EF Program Promotion Matrix*, a simple, customizable tool to develop a promotion plan to recruit key stakeholders (this matrix will be referred to in subsequent phases as well);
- *Silicon Valley EF 2009 Fact Sheet*, an example of a summary, used in the Silicon Valley 2009 Encore Fellows program, to describe value propositions to key stakeholders.

Step 3: Define the social issues and entities the program will target:

Some Encore Fellowships programs will be defined at least in part by the social issues they address or by the social-purpose entities that will host the fellows. While all Encore Fellowships programs will target placing fellows in high-impact assignments, the particular focus of the assignments should reflect the mission alignment and intended outcomes defined in the earlier questions. Now is a good stage in the design process to choose whether to focus your program on certain issues, types of entities, or geographic locations.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- *Work Host Roles*, an overview describing the potential roles of and benefits to a work host in the program. This may be of use in targeting host entities.

Some possible options:

- a. targeting one or more categories of traditional non-profits (e.g., education, environment, health, children and youth, older adults, arts and culture);
- b. placing fellows in public organizations (e.g., school districts, local governments, library systems);
- c. a focus on assisting entrepreneurial social ventures;
- d. opening the program up to a diverse group of work hosts in a specific city or region.

Step 4: Define the fellow profiles the program will target:

An EF program might be defined at least in part by the source or type of fellows it places. While all Encore Fellowship programs will have fellows with significant transferable skills, individual programs might target fellows from a particular company or profession, or focus on a particular functional background. These choices will reflect the mission alignment and intended outcomes defined in the earlier questions. They may also open up opportunities to partner with corporations, membership organizations, or other groups that already have established networks that include good fellows candidates.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- *SVEF Meet the 2009 Fellows*, an overview of the Fellows and Work hosts in the Silicon Valley 2009 Fellows program;
- *Fellow Assessment Tool*, a customizable template for assessing skills of potential Fellows (and skills needs of potential Work Hosts)

Step 5: What are the top-level terms of the fellowship?

Fellowships programs can offer a variety of structures and terms. Describe your vision of terms such as program duration, desired work impact, schedule, and fellow compensation.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- *EF Terms Sheet*, a customizable tool that describes the terms of a Fellowships Program
- *Recommended Program Attributes*, a one-page summary of recommended ranges for EF program term elements

Phase 1 Checkpoint:

Create a concise program concept brief and share it with potential stakeholders. Assess their level of interest, commitment and leadership to take the idea forward. We recommend obtaining formal endorsement of the concept from the program leader's governing body at this point, and holding an initial design review with the EFN director. Make necessary adjustments, then proceed to the next phase

Phase 2 - Develop a full Program Plan

Define the necessary components and activities in a working program. In this phase you choose the target size, structure and terms of the program; make a plan for how to recruit and match fellows and organizations to host them; outline program administration tasks and resource requirements; identify other partner organizations; create a budget; and define a high-confidence funding model.

The objective in this phase is to develop a detailed description of the necessary components and activities of the program, including a budget and a funding model. The output of this step is a program plan, which builds on the concept brief, adding sufficient detail to begin recruiting partners and funding sources. We recommend the following six steps to create an actionable program plan:

1. Project the size and structure of your program
2. Define a plan for recruiting, selecting and matching the fellows and the work hosts
3. Outline the administrative and other operating support that will be required
4. Recommend which organizations will play the major operating roles for the program
5. Create a budget covering program operations
6. Define and test a funding model for program stipends and operating costs

Step 1: Project the size and structure of your program:

We believe that an effective EF program could have as few as three fellows or as many as 20 in a cohort (with even greater variation coming in network programs with virtual cohort groups). Each fellow may be assigned to a single work host, but in some cases multiple fellows will work at a single host organization, and in some cases one fellow will cover more than one host. Our recommendation for most programs is a cohort of 8-15 fellows working in similar environments.

Some options:

- one or a few mostly isolated fellows;
- a matched cohort of 8-15 fellows, each with a different work host;
- an integrated team of fellows with different functional expertise working on a single project
- a team of fellows with similar roles working across divisions of a large institution.

Step 2: Define a plan for recruiting, selecting and matching the fellows and the work hosts:

We believe that good matching is the single most important success factor in an EF program. First, define your key match criteria (e.g., location, skills, interests, schedule needs), then finalize the supporting tools and processes, and finally clarify the roles you expect the fellows, the work hosts and the program operator to play. While good tools and forms can be of great benefit to the matching process, they are not sufficient – we strongly recommend a thorough and thoughtful screening, interview, and selection process involving one or more experienced recruiters.

The standard Encore Fellowships process (based on the EFMATCH online recruiting system) includes the following components:

- a plan to reach out to prospective participants and to invite them to apply to the program,
- application forms that assess fellows' skills and work hosts' skill needs as well as preferences regarding location and schedule,
- a description of the selection and matching process covering roles and expectations of the fellows, the work hosts, and the program operator.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- Program Operator Guide (Recruit/Match), program guide for Recruit/Match phase of a fellowship program (after completion of Design Phase)
- Work Host Selection Guidelines, guidelines for work host applications, screening and selection
- SVEF2009 Fellow Recruiting Piece, an example of a document, used in the Silicon Valley 2009 Encore Fellows program, to recruit potential Fellows
- Skill Ratings Sheet, a customizable template for assessing skills needs of potential Work Hosts and skills of candidate Fellows

Some options:

- a grantor organization may select work hosts from their grantees;
- a membership organization would normally structure the program around their members, either to be fellows or to nominate participants;
- use word of mouth through community groups, local corporations, volunteer organizations, and board memberships
- publicize and post openings in public forums;
- use the EFN matching database (available for approved core EFN programs).

Step 3: Outline the administrative and other operating support that will be required:

Program owners may take on a variety of program support roles, depending on the structure and needs of the program and the roles defined for other players. At a minimum, program owners will normally take the lead on the critical task of matching fellows and work hosts, but they may also perform most or all of the administrative aspects of the program. Any support planned for work hosts or other parties to perform should also be documented in this step. Also describe any special procedures, materials and training that would need to be developed and delivered. Include resources needed both for development and delivery of materials and events. Complete this step with enough detail to create a preliminary budget for the program.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- *Sample program tasks and timeline*, a sample timeline for a fellowship program; to be used as a guideline

- *Sample Curriculum*, recommended program curriculum; to be used as a guideline
- *Technical Fellows Training Plan*, a one-page document outlining training for an EF program under design

Step 4: Recommend which organizations will play the major operating roles for the program:

Now that the program size and components are defined, you should be able to target which partners you will need to recruit to operate it, with a special emphasis on the program operator. The program operator plays the central administrative role in a functioning fellowships program. Often the organization leading and sponsoring the program will identify existing staff members (or add one or more staff members) who can perform program administration tasks. Other program sponsors will prefer to contract these functions entirely to another organization that is better suited to running programs. Either model works (or some combination of the two), but given the pivotal nature of the role, we recommend making that determination at this point in the design process.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- *Program Operator Guide* (Recruit/Match), program guide for Recruit/Match phase of a fellowship program (after completion of Design Phase)
- *Program Operator Guide* (Operations), program guide for Operate phase of a fellowship program (after completion of Recruit/Match Phase)

Some options to consider:

Program operation can range from a set of tasks assigned to existing staff in an organization to a dedicated role or team assigned to the EF program. In addition, the work is typically seasonal - recruiting and matching can be very resource-intensive, while on-going program administration once fellows are in place may consume almost no resources. Special skills - particularly for interviewing and matching or for training - may be required for specific tasks during the fellowship term. Now that you have defined the program terms and resource requirements, you can and should determine what organization and if possible what individuals will actually perform the required operator functions.

Step 5: Create a budget covering program operations

Estimate costs for program creation activities, promotional expenses, recruiting and matching, fellow compensation, travel and other operating expenses, and on-going program administration. At this point, the budget should contain reasonable estimates of each category of costs, with enough documentation of assumptions that it can be easily updated later in the design cycle.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- *Sample Budget Worksheet*, a customizable worksheet for estimating funding requirements (program budget), with an example of a completed program budget

Some options to consider:

- program-level expenses may be limited to direct expenses of one part-time program administrator, or
- reflect direct and indirect costs of a larger support team and significant outreach and operating costs, depending on the program structure and roles.

Step 6: Define and test a funding model for program stipends and operating costs

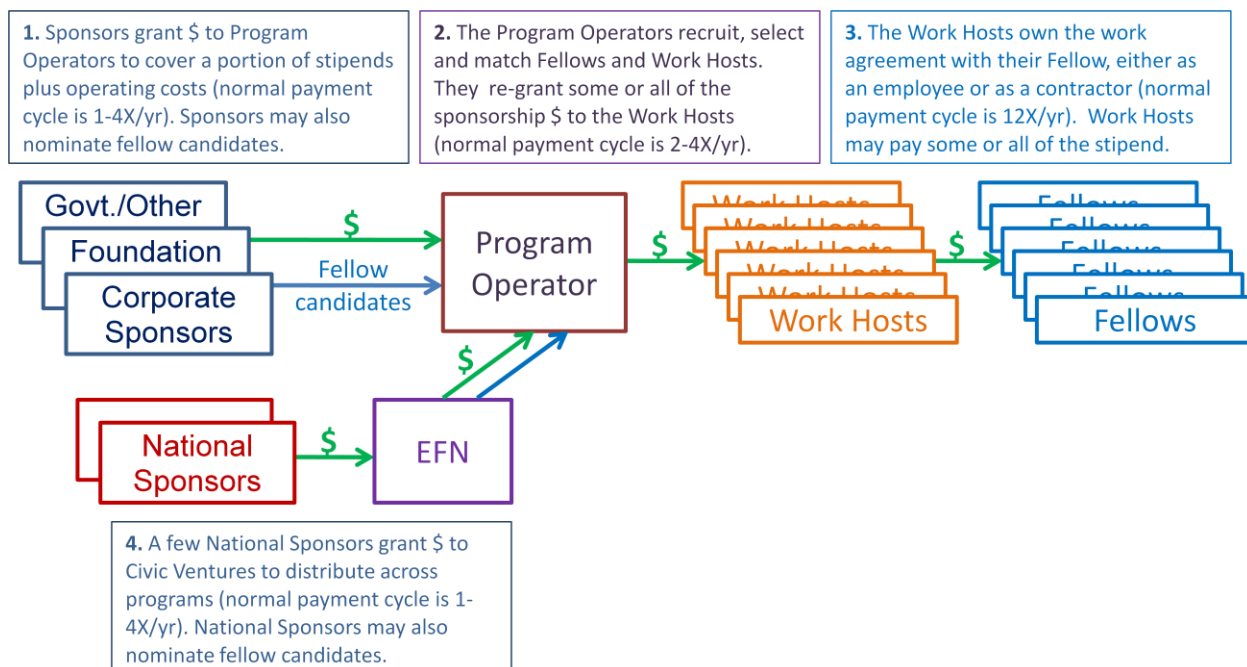
Using the program description and the budget from the prior phase, define a plan to secure funding from program stakeholders. You'll want to be able to articulate how each stakeholder will benefit from your program, and what a reasonable funding expectation will be. Test the plan with some or all of the organizations on your list.

Each party that benefits from the program is a prospective funder for the program. As you write benefits statements, wherever possible point out potential economic benefits (e.g., more efficient operation for work hosts, lower severance costs for corporations) as well as softer outcomes (e.g., community engagement, goodwill among employee base).

In a typical fellowship, the market value of the work performed far exceeds the compensation amount to the fellow, and we strongly recommend that work hosts be asked to contribute at least some of the fellows' compensation. In some cases, grantor organizations will sponsor the fellows' work as a capacity-building grant or to enable transformational change outside the normal budget process. Normally funding commitments should be obtained in advance and for the entire fellowship period, although payments may be spread over time. Seek committed funding agreements from participants before launching the program.

We recommend you define a specific fund raising plan, with clear strategies, target sponsors, and schedule for obtaining committed funding. Establish clear roles and assignments for fundraising activities. At this stage not all potential funders may be willing to make firm or final commitments, but the program leader will need to gather enough information to make a reasoned decision to move forward or not.

The following diagram shows a typical flow of funds for sponsored fellowships:



- Additional resources in the Program Operator Wiki (under *Program Creation Guide*):
- PDF versions of the *EFMatch application forms*
 - *Funding EF Programs*, a description of the proposed financial model

- *Corporate Sponsor Role Definition*, an example of a document, used in the Silicon Valley 2009 Encore Fellows program, describing the role for Corporate Sponsors
- *EF Program Promotion Matrix*, a simple, customizable tool to develop a promotion plan to recruit key stakeholders (introduced in Phase 1)
- *Sponsor Value Propositions*, a list of compelling reasons that funding organizations might want to sponsor Encore Fellowships programs.
- *SVEF Corporate Brochure*, a one-page document used for recruiting corporate sponsors in the SVEF program

Some options to consider:

- work hosts may fund some or all of fellows' compensation and even program costs; you can also consider using them to approach their grantors
- program operators may be willing to cover or contribute to administrative costs;
- in some cases, public funds may be available for programs that meet specific criteria
- try to redirect budgeted corporate expense streams (e.g., workforce redeployment costs, marketing funds, community engagement initiatives);

Phase 2 Checkpoint: Create a more detailed program plan that enables you to begin recruiting partners and funding sources. We recommend testing the program concept with prospective work hosts and fellows as well. Try to engage funders and verify their level of interest and commitment in advance. Obtain final approval as a Core EFN Program. Make necessary adjustments, especially to balance sources and uses of funds, then proceed to the next phase.

Phase 3 - Prepare the program for launch

Create a project implementation plan with a task timeline and clear ownership. Complete any desired customization of marketing materials, forms and tools. Hire or assign staff and provide them with proper training.

The objective of this phase is to make all the necessary preparations to actually launch the program. In this phase, you will perform the following four steps:

1. create a timeline with tasks, owners and dates
2. confirm that you have adequate staff in place, with appropriate tools and training, to cover the task list.
3. ensure that you have in place all necessary processes, forms and tools, including website modifications, links to the application forms, and a working EFMatch portal.
4. complete a final pre-launch checklist

Step 1: create a timeline with tasks, owners and dates

This is basic project management, but it's a good practice to pause prior to launching the program and make sure the basics are in place.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- Program Operator Guide (Recruit/Match), program guide for Recruit/Match phase of a fellowship program (after completion of Design Phase)
- Sample Applicant Rating Sheet, a simple, customizable form to rate and select Fellows applicants

- Sample Work Host Rating Sheet, a simple, customizable form to rate and select Work Hosts applicants

Step 2: confirm that you have adequate, trained staff in place:

By now you should be able to describe roles and means of delivery for program services. These may include initial orientation and training; facilitation of work contracting; fellow cohort interaction opportunities; on-going program curriculum, monitoring and intervention; transition services at the end of the fellowship; and evaluation activities. Make sure that you have identified and trained the people who will perform each of these activities.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- *SVEF Curriculum*, recommended program curriculum; to be used as a guideline
- *Sample Statement of Work* form, a customizable Statement of Work template
- *SOW form: Silicon Valley EF pilot*, a sample Statement of Work form
- *SVEF2009 Evaluation* (Extract), excerpts from the third-party evaluation of the 2009 Silicon Valley Encore Fellows program (file name FellowEvalExecSum.pdf)

Some options to consider:

- use existing staff of your organization to perform services;
- use a "seed fellow" to serve as the program manager;
- contract with third parties to provide these services as needed;
- use the fellows to self-organize cohort activities;
- enlist a community foundation to lead social-sector exposure activities.

Step 3: ensure that you have in place all necessary processes:

Map out the major activities to launch and operate the program: finalizing the design; securing funding agreements, recruiting and matching work hosts and fellows; and delivering the program services. Distribute your detailed project timeline with tasks, owners and dates for the remainder of the program. Highlight any issues and open items, and note any risk areas remaining.

Additional resources in the Program Operator Wiki (under *Program Creation Guide*):

- *Standard Program Timeline*, a sample timeline for a fellowship program; to be used as a guideline
- *EF Program Project Planning Chart*, a customizable project timeline template

Step 4: Complete a final pre-launch checklist:

Use this checklist to review preparations for the launch of your program.

?	Task
	1. We have an approved program definition document outlining the purpose, structure and terms of the program and defining all major stakeholder roles
	2. We have a budget consistent with the program plan
	3. We feel confident that funding for all aspects of the program is secure

	4. We have obtained final Core Program approval from the EFN director
	5. We have received our custom EFMATCH portal and links to the application forms
	6. We have trained staff in place to perform all the tasks on the timeline
	7. We have a clear target profile for program fellows and work hosts and are ready to begin recruiting
	8. We have created or customized the necessary forms and instructions for prospective fellows and work hosts and those who will interview and match them
	9. We have a process defined and people identified to screen and match applicants
	10. We have defined the fellows training and curriculum
	11. We have the administrative processes in place for program operations, including compensation
	12. We are prepared to facilitate smooth on-boarding activities

Phase 3 Checkpoint: If you have checked off each item on the pre-launch checklist, your program should be ready to launch.

Phase 4 – Recruiting, selecting and matching

Reach out to prospective fellows and work hosts, inviting them to apply to the program. Screen the applicants, create match options for their review, facilitate matching interviews, and certify final mutual matches. Prepare any necessary training and orientation for the incoming cohort.

We believe that a high-impact fellowship can occur when a Fellow’s skills, experience, and personality align with the mission, values and specific needs of a qualified Work Host. The Recruiting and Matching process is where this alignment is achieved. We describe the Encore Fellowships Recruiting and Matching process using the following five steps:

1. **Recruit prospective Fellows and Work Hosts**, and ask prospective Work Hosts to define high-impact Fellowship Positions within their organizations. EFMATCH provides two sets of forms – a single application for prospective Fellows and set of forms for prospective Work Hosts – which Program Operators can easily link to from their websites, from recruiting emails, or from other sites. These forms are the primary source of applicant data for the EFMATCH system.

Key recruiter tasks:

- a) Get access to EFMATCH

- b) Place links to your program-specific application forms on your website, in outreach emails, or in online placements
2. **Screen Fellow and Work Host applicants and proposed Fellowship Positions.** Program recruiters identify the individuals and organizations who would be strong candidates for their program and decide which positions defined by the Work Hosts would be good Fellowship Positions.
- Key recruiter tasks:*
- a) Review Fellow and Work Host candidate profiles and Fellowship Position descriptions
 - b) Rate all Fellow and Work Host candidates and Fellowship Positions
 - c) Select fellow candidate key skills and Fellowship Position key skill requirements
3. **Match Fellows and Fellowship Positions.** Program recruiters create *Match Options* that link Fellow candidates with one or more potential positions, based on factors such as skills, social issues, work styles and location. After creating a Match Option, Program recruiters invite the Work Host and the Fellow to review and rate the proposed matches and communicate their interest in pursuing them further, using online Applicant Rating Pages.
- Key recruiter tasks:*
- a) Create Match Options for Fellow candidates with Fellowship Positions
 - b) Ask Fellow candidates to rate and comment on potential positions and Work Hosts to rate and comment on Fellow candidates
4. **Facilitate candidate interviews.** Program recruiters facilitate activities that allow prospective Fellows and Work Hosts to explore one or more Match Options. These activities often include telephone and in-person interviews, shadowing, references, and other exchanges of information. Candidates use the Applicant Rating Pages to update their ratings and comments.
- Key recruiter tasks:*
- a) Collect candidate feedback before and after interviews
 - b) Use the rating information to inform final match decisions
5. **Oversee the final match decisions.** The Recruiting and Matching process comes to a successful conclusion when Program recruiters facilitate *mutual matches*, placing Fellows in high-impact work assignments with their host organizations.
- Key recruiter tasks:*
- a) Facilitate final mutual matches of fellows and work hosts
 - b) Provide a process and templates for formal statements of work for each fellowship position
 - c) Update the status of all EFMATCH records. The records will then be converted for use during the program year for cohort management tasks.

Additional resources in the Program Operator Wiki (under *EFMatch Documentation*):

- *EFMatch Overview*, a set of slides explaining the recruiting and matching process and the EFMATCH tools that support it
 - *EFMatch Cheat Sheet*, a one-page overview of the system and the process it supports
 - *EFMatch User Guide*, detailed step-by-step instructions and glossary for EFMATCH users
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Phase 5 – Operate the program

Facilitate successful on-boarding of fellows into their assignments. Provide on-going cohort enrichment opportunities and program evaluation tools. Offer intervention support if needed.

The objective of this phase is to facilitate the smooth on-boarding and on-going effectiveness of the program, and to ensure that participants have rich learning opportunities throughout the assignment. We can think of these activities in the following four categories:

1. Facilitating smooth on-boarding of fellows and work hosts
2. Ensuring the cohort experience is rich and valuable
3. Monitoring program effectiveness
4. Contributing to the transition into longer-term roles in the social-purpose sector

Step 1: On-boarding

The Program Operator has an important role in facilitating a smooth orientation to the assignment, including the creation of joint statements of work between the fellows and their host organizations. Specific activities may include some or all of the following:

- Host program orientation for Work Hosts and Fellows
- Establish program Meeting Schedule (monthly, quarterly, and annual sessions)
- Present Curriculum and learning framework (based on program lifecycle)
- Establish quarterly or semi-annual reporting expectation for Work Hosts and Fellows
- Establish group identity and purpose
- Provide templates and a process for completing Statements of Work

Step 2: Cohort Experience

Program Operators normally provide regular and ongoing opportunities for learning and networking during the fellowship for the cohort of encore fellows and work hosts to interact with and learn from each other and for fellows to gain a broader exposure to the social-purpose sector. Typical roles the Program Operator might play include the following:

- Facilitate Program Curriculum, adjusting as needed
- Facilitate group learning process and norms
- Host events, curricula, speakers, shadowing, online forums, etc.
- Solicit and provide ongoing feedback to Fellows, Work Hosts, and Sponsors
- Monitor program process
- Provide networking opportunities

Step 3: Monitoring effectiveness

Program Operators should check in regularly with all constituents and employ formal program evaluation techniques to monitor program quality, prompt corrective action as needed, handle any escalations, and provide useful feedback for ongoing program improvement. Using the standard EFN Program Evaluation tools (incorporated into EFMATCH), Program Operators can take the lead in formally tracking program effectiveness and incorporating feedback into future program design.

Step 4: Transition Support

There are several ways Program Operators can contribute to help fellows transition from their assignment into other longer-term opportunities to perform social-purpose work. They can:

- Provide opportunities for Fellows to meet and learn about other Encore Career opportunities
 - Provide networking events and activities
 - Support specific Work Hosts and Fellows considering career position offers
 - Facilitate Fellow and Work Host transition process to post- Fellowship period
 - Collect and analyze year-end reports
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Additional Resources Available:

- Join the Encore Fellowships Programs Community
- Visit the EFN Program Operator Wiki
- Contact the Encore Fellowships Network team (info@encorefellowships.net)