# Manager's Worksheet:

## Planning and Implementing Peer Groups

Although the preceding pages include information on how other programs have approached building social capital, there are no "right" answers as to what approaches to use or how to implement them. You and your partners can use this worksheet, combined with knowledge of your program's characteristics, to explore whether or how to adopt or expand use of this practice to improve individual outcomes in your program.

---

To what extent do your program participants share a common set of characteristics, experiences, situations, challenges, and/or goals?

---

Given the above, could peer groups help participants better achieve their goals? To what extent? How would the successful use of peer groups relate to your program's overall mission?

---

Which staff roles or individuals might be best suited to facilitating a peer group? Are there current participants who might be interested and successful in this role with the right training?

---

What group size would be large enough for participant groups to include diverse perspectives and resources but small enough to facilitate strong interpersonal bonds?

---

Taking into account participant schedules, priorities, time needed to progress toward goals, and other relevant factors, how frequently should groups meet?

---

To what extent should the group have consistent membership, even if not everyone can attend every meeting?

---

Is your objective to use the peer group to build bonding capital, bridging capital, linking capital, or some combination of these? How does that affect the way you structure the group?

---

How might your program help a peer group set its own rules, structure, schedule, and content?

# Manager's Worksheet:

## Facilitating Meaningful Participant Engagement

Although the preceding page includes information on how programs have addressed social capital, there are no "right" answers as to what approaches to use or how to implement them. You and your partners can use this worksheet, combined with knowledge of your program's characteristics, to explore whether or how to adopt or expand this practice to improve individual outcomes.

Does your program have a straightforward way for participants to form relationships with each other, staff, mentors, or program alumni that could increase progress toward program goals?

To what extent do these relationships tend to be meaningful and long-lasting? How might these initial relationships be strengthened? Would it be beneficial for the people involved to meet more often or in a different context?

How can relationships be extended either in the formal program or beyond? For example, could the program itself be prolonged in some way so that people are more likely to keep in touch?

Would it make sense to increase alumni involvement with each other, the program, and its current participants? If so, how might you do that?

Are there uninvolved alumni who would make great mentors, champions, or examples for current participants? What are the barriers to connecting with these alumni, and how might you overcome them?

# Manager's Worksheet:

## Tapping into Organizational Social Capital to Increase Participants' Individual Social Capital

Although the preceding page includes information on how programs have addressed social capital, there are no "right" answers as to what approaches to use or how to implement them. You and your partners can use this worksheet, combined with knowledge of your program's characteristics, to explore whether or how to adopt or tailor this practice to help participants tap into organizational social capital to improve their individual outcomes.

| Unmet Participant Needs | Community Partners That Could Help | Network Status | Action Plan |
|---|---|---|---|
| *What needs do your program participants have that your organization is currently unable to fully meet? Which are the participants' highest priorities?* | *What organizations, entities, or individuals in the community might be able to help participants better meet these needs and goals?* | *Does your organization already have a relationship to this potential partner?* *If so, to what extent? Who in your organization has these connections? Can these connections be strengthened?* *If not, is it possible to find someone within or outside your organization who can facilitate these connections?* | *What concrete steps could you take to develop or strengthen this partnership to help participants tap into your organization's social capital? Consider which partnerships are most important to prioritize in the short, medium, and long terms.* |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Manager's Worksheet:

## Identifying and Using Technology in Your Program

Although the preceding page includes information on how programs have addressed social capital, there are no "right" answers as to what approaches to use or how to implement them. You and your partners can use this worksheet, combined with knowledge of your program's characteristics, to explore whether or how to adopt or refine this practice to improve individual outcomes.

| Technology or Platforms Already Used by Participants (Including Social Media) | Prevalence <br><br> *About what percentage of participants already use this technology or platform?* | Program Use <br><br> *How could your program use this technology or platform to help participants build and use social capital and improve their outcomes?* |
|---|---|---|
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Manager's Worksheet:

## Using Data and Logic Models for Social Capital Decision-Making and Evaluation

Although the preceding page includes information on how programs have addressed social capital, there are no "right" answers as to what approaches to use or how to implement them. You and your partners can use this worksheet, combined with knowledge of your program's characteristics, to explore whether or how to adopt or expand this practice in your organization to improve individual outcomes. For more information, see this brief, *Measuring Social Capital in Human Services Programs*, and this tool, *How to Include Social Capital in a Human Services Program Logic Model*.

What data points are your organization currently gathering to understand how social capital is being used in your programs? Are these data points being shared with participants? Are they being used to help participants build better connections?

Do you have a way for individuals to *assess or monitor* their own levels of social capital, whether bonding, bridging, or linking?

To what extent does your organization currently use these data points or measures, if at all? What else can your organization do with the data to evaluate and improve programming?

Does your organization have a logic model that explains how you plan to use social capital to help achieve program goals? Are you collecting the data you need to determine whether you are meeting program goals and to make your case to funders?

What other data would help your organization support social capital development? What additional resources or changes in structure would be necessary for your organization to gather this data?

# Manager's Worksheet:
## Creating Spaces and Opportunities that Foster Organic Connections

Although the preceding page includes information on how programs have addressed social capital, there are no "right" answers as to what approaches to use or how to implement them. You and your partners can use this worksheet, combined with knowledge of your program's characteristics, to explore whether or how to adopt or refine this practice to improve individual outcomes.

To what extent might increased organic connections among participants and with other organizational stakeholders improve program outcomes? How?

What are the most comfortable spaces or times in your organization for you and your participants to interact or for them to interact with each other?

In these spaces or times, can participants interact with someone from any part of the organization? Are there ways to make them more welcoming or to bring in a broader array of stakeholders?

How can you make "connection times" more frequent or accessible, or include more participants?

To what extent do existing structured activities facilitate relationship-building? Are there ways to add new structured-engagement opportunities or restructure existing ones to further program goals while creating an opportunity for relationships to begin to form?

To what extent does your program already use food and social time to encourage mingling and relationship-building? Are there ways to increase the opportunities for participants and other stakeholders to spend time together in a relaxed and informal environment to further program goals?

# Manager's Worksheet:

## Including Qualified Individuals or Alumni in Programming and Staffing

Although the preceding page includes information on how programs have addressed social capital, there are no "right" answers as to what approaches to use or how to implement them. You and your partners can use this worksheet, combined with knowledge of your program's characteristics, to explore whether or how to adopt or expand this practice to improve individual outcomes.

How can your alumni provide honest input for program improvement?

To what extent might hiring qualified alumni or individuals with similar experiences further program outcomes? How so?

Would program participants say that they feel their experiences are reflected in staff members' backgrounds? If not, how can you recruit and hire volunteers and staff with whom participants can relate?

How can you equip program alumni with the skills and qualifications needed to serve as staff members?

What additional support might alumni staff members need?

Which, if any, specific alumni or staff members do participants name as being role models?

What are the characteristics that make someone a role model? How can you encourage participants to build relationships with role models in the program?

# Manager's Worksheet:

## Emphasizing Accountability

Although the preceding page includes information on how programs have addressed social capital, there are no "right" answers as to what approaches to use or how to implement them. You and your partners can use this worksheet, combined with knowledge of your program's characteristics, to explore whether or how to adopt or expand this practice to improve individual outcomes.

*To what extent might an emphasis on accountability among participants and other stakeholders help strengthen progress toward program outcomes?*

If you think an accountability agreement is right for your program, consider what you would want it to include. Often programs write agreement templates with spaces to enter any relevant names, dates, and signatures. Items to consider incorporating may include relationship goals, minimum program commitments and responsibilities, norms for interaction, a timeline with end or renewal dates, and confidentiality expectations and limitations. For example, a mentoring program may consider including something like the following as part of its template:

*This is an agreement between _____[name]_____ and _____[name]_____. Our goal as a mentoring pair is to support _____[name]_____ in achieving their career, education, and well-being goals. We agree to form a two-way relationship, where each participant is valued and is able to contribute to the relationship. We will prioritize building trust and maintaining an open, honest relationship. We agree to meet [frequency] for at least [time period], after which time we will mutually consider whether to extend our commitment. If we opt to communicate outside of regular in-person meetings, we prefer to communicate via [text/email/phone call]. We commit to holding any information shared between us as confidential and private, except in cases where the safety of an individual is at risk.*

| Agreement Topic | Relevant Text to Include in Agreement |
|---|---|
| Goal(s) of relationship | |
| Roles and responsibilities for each person | |
| Commitments by each person | |
| Other topics as needed | |
| Other topics as needed | |