DK CAPITAL GROUP

Technical Workforce Development Initial Contractor Roles & Responsibilities

A practical guide to the people and contracted support needed to develop the initial Technical Workforce Development Initiative.

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1. Purpose and Working Structure

The initiative is intended to begin with a funded Trust, outside legal and accounting support, and a small contracted operating team. This guide is meant to help the Trustee, attorney, CPA, and anyone assisting with recruitment understand who needs to be hired, what each person or firm is expected to do, and where the lines of authority should remain.

These are contracted functions, not permanent positions. An individual may fill a role, or a firm may provide it. The arrangement can change later if the workload shows that a permanent employee or larger organization would work better.

Function	What it is there to do
Technical Workforce Program Director	Find real workforce needs, develop workable projects with schools and employers, and stay close enough to the field to know whether the project is working.
Financial & Funding Manager	Work out what a proposed project will cost, what outside money can realistically be used, what restrictions come with it, and how much Trust capital is needed.
Trust Administration & Operations	Keep the back office organized: contractor records, HR-related administration, invoices, insurance records, files, access, scheduling, and continuity.

The Program Director and Financial & Funding Manager should report directly to the Trustee as peers. Neither should supervise the other. Trust Administration supports the work but does not decide which projects are worthwhile or which ones receive funding.

2. Technical Workforce Program Director

This is the principal field role. The right person should be comfortable spending time in technology centers, two-year colleges, employer shops, plants, farms, construction sites, and other technical workplaces. The job is to understand what employers actually need, what schools are already doing, and what is keeping the two from producing enough qualified workers.

What the Role Does

- Build working relationships with the first participating schools, instructors, employers, and technical contacts.
- Identify technical jobs and skills that employers repeatedly struggle to fill.
- Look at the training already available before proposing something new.
- Figure out what is really limiting the program - equipment, instructor capacity, scheduling, transportation, outdated training, employer participation, student readiness, or another practical problem.
- Work with schools and employers to turn that problem into a specific project that can be evaluated and funded.
- Work with the Financial & Funding Manager early enough that cost and funding realities are understood before the project goes to the Trustee.

- Stay involved after approval, help work through problems, and make sure the project still addresses the need it was created to solve.
- Pay attention to recurring employer feedback and use it to identify program-level training gaps.

The Program Director is not there to run the school. Student selection, classroom instruction, academic decisions, credentials, and individual placements stay with the institution. Individual student performance should be worked out between the student, instructor, and employer. The Director's interest is in patterns that show the program itself may need to improve.

The Director also does not supervise employer personnel, control Trust payments, or promise funding before approval. Outside specialists may be recommended when they are needed, but the Trust decides whether to engage and pay them.

What We Are Looking For

A strong candidate may come from technical education, skilled trades, industry, agriculture, workforce development, or a combination of those areas. Practical credibility is more important than a polished nonprofit background.

- Enough technical understanding to know whether a proposed solution makes sense and enough judgment to know when a specialist is needed.
- Comfort talking with instructors, business owners, managers, school administrators, and the people actually doing the work.
- Willingness to spend time in the field rather than manage the program mainly from a desk.
- Good judgment about whether a workforce problem is real, whether the proposed response is proportional, and whether the result is likely to last.
- The ability to write a short, clear recommendation that explains the problem, the proposed response, the expected result, and what still needs to be decided.
- A practical approach that favors useful results over unnecessary process.

3. Financial & Funding Manager

This role works alongside the Program Director. It is not the Trust's bookkeeping function and it does not replace the CPA. Its job is to make sure a proposed project has a workable financial plan before the Trustee is asked to commit money.

What the Role Does

- Build a realistic project budget with the Program Director and participating school.
- Identify school, CareerTech, Perkins, WIOA, apprenticeship, federal, foundation, manufacturer, dealer, employer, and other funding that may actually fit the project.
- Determine who is eligible to apply for and receive each outside funding source.
- Coordinate the overall funding package. In many cases the school, college, foundation, workforce entity, or other eligible organization will be the actual applicant and recipient.
- Track matching requirements, allowable uses, deadlines, reporting obligations, and other conditions that matter to the project.
- Show the Trustee what can reasonably be funded elsewhere and what amount of Trust capital would still be needed.
- Work with the CPA and school finance staff so project budgets and Trust accounting do not conflict.

- Watch approved budgets and flag material cost, timing, or funding changes before they become problems.

The Funding Manager should look for leverage, but not chase money simply because it is available. A grant that pulls the project away from the actual workforce need, creates unreasonable restrictions, or delays a worthwhile project may not be worth pursuing.

The funding follows the workforce need. The workforce need does not follow the grant.

The Funding Manager does not decide alone which projects receive Trust money, release Trust funds without the required approvals, or commit the Trust or a partner to a grant match or reporting obligation without authority. A specialized grant writer or technical consultant can be recommended when needed, but the Trust decides whether to retain that person or firm.

What We Are Looking For

- Experience with project budgeting, restricted funds, grant administration, education or workforce funding, foundations, or other multi-source finance.
- The ability to read funding rules and quickly identify the important eligibility, timing, matching, and reporting issues.
- Comfort working with school finance offices, CPAs, attorneys, public agencies, foundations, manufacturers, and employers.
- The judgment to recommend against a funding source when the restrictions or timing make it a poor fit.
- The ability to explain a complicated funding package in plain language.

4. Trust Administration & Operations

The contractor model will only stay lean if the back office is dependable. Trust Administration & Operations handles the routine work that keeps records, payments, contracts, and access organized. This could be provided by a management-services firm, an accounting-related provider, or an experienced administrative contractor.

- Maintain contractor agreements, onboarding records, renewals, qualifications, and basic HR-related records.
- Maintain secure Trust, school, employer, grant, and project files and control access to shared systems.
- Collect invoices, expense support, insurance certificates, and other documentation required before payment.
- Keep meeting records, project files, scheduling, and routine administrative communication organized.
- Make sure contacts, passwords, grant calendars, work product, and project history do not disappear when a contractor leaves.
- Support the Trustee's periodic review of active projects and coordinate administrative records with the CPA and counsel.

This is a support function. It should not decide which workforce projects move forward, determine whether a school program meets the workforce need, or become the gatekeeper between the Program Director and the schools or employers.

5. How Decisions Should Work

The division of responsibility should stay simple. The Program Director explains why a project is needed and what it should accomplish. The Financial & Funding Manager explains what it will cost, what other resources are available, what restrictions matter, and what the Trust would need to provide. The Trustee decides whether the Trust will commit capital.

Question	Who leads it
What workforce problem are we trying to solve?	Program Director
What training already exists and what is limiting it?	Program Director
What response would actually remove the constraint?	Program Director with school and employer input
What will it cost and what outside resources can be used?	Financial & Funding Manager with the Program Director and school
How much Trust capital is needed?	Financial & Funding Manager
Does the project warrant Trust support?	Trustee, with professional review when needed
Is the project staying on course?	Program Director, with financial monitoring by the Funding Manager
Are funds being used as approved?	Financial & Funding Manager, with CPA/accounting oversight
Did the project improve workforce capacity?	Program Director, using school and employer results

Authority and Conduct

Contractors need enough latitude to develop projects and work with partners, but that should not be confused with authority to obligate the Trust. Unless written authority has been delegated, a contractor may discuss a possible project, gather information, request proposals, and work out details, but may not promise funding, sign an agreement, or incur an obligation on behalf of the Trust.

Any personal, family, business, or financial interest involving a project, vendor, employer, consultant, or recipient should be disclosed. Related-party transactions should receive independent review. Work product and project records developed for the initiative should remain available to the Trust if a contractor leaves.

Professional advisors should be brought in when the issue falls outside the contractors' roles: counsel for trust authority, agreements, privacy, employment, or apprenticeship questions; the CPA for accounting and tax treatment; insurance advisors for project-specific risk; and technical or grant specialists when the project needs expertise the core team does not have.

6. What the First Operating Cycle Should Produce

The first contractor team is being hired to prove the model, not build a statewide organization. The early work should produce a small number of good projects and enough organized information that the Trustee can decide what should happen next.

Program Director

- A short written assessment of the technical programs already available in the initial area, the employers using those skills, and the most obvious workforce gaps.
- A current list of the schools, instructors, employers, and technical contacts involved in the pilot.
- A short list of the workforce constraints that appear worth developing into projects.
- Clear project briefs for roughly two to four proposed pilot investments.
- Brief implementation updates on approved projects.
- A practical end-of-pilot assessment of what worked, what did not, and what should change before expansion.

Financial & Funding Manager

- A practical list of the funding sources that could realistically apply to the first schools and projects.
- A project budget and funding plan for each proposed investment.
- A calendar of the funding deadlines and matching requirements that actually matter to the pilot.
- Simple tracking of Trust commitments, outside funding, restrictions, and remaining balances.
- A concise financial recommendation for each project that goes to the Trustee.
- An end-of-pilot financial review showing how Trust capital was used, what outside resources were brought in, and where the funding model needs to improve.

Trust Administration & Operations

- Complete contractor and professional-service files.
- An organized electronic project filing system with controlled access.
- A workable invoice and payment-support process.
- Current insurance and qualification records.
- Enough organized records that another contractor could pick up the work without starting over.

Startup Sequence

The intended sequence is straightforward: establish and fund the Trust; put counsel, accounting, banking, and basic administration in place; engage the Program Director as the first principal operating contractor; bring in the Financial & Funding Manager at the same time or shortly afterward; then begin the first school and employer development work.

7. Performance, Contracting, and Future Staffing

The contractors should be judged by the quality of the work and the capacity created, not by how busy the program looks.

Function	What good performance should look like
Program Director	Useful school and employer relationships; real workforce needs identified; strong projects developed; good follow-through; recurring training gaps recognized; practical problems corrected.
Financial & Funding Manager	Clear budgets; appropriate outside funding identified; restrictions and deadlines managed; Trust money used efficiently without letting grants drive priorities; financial problems caught early.
Trust Administration & Operations	Accurate, accessible records; timely administrative support; secure files; organized payment documentation; continuity when people change.

A contractor should not be judged by how many meetings were held, grants were submitted, or dollars were spent. The real measure is whether the Trust's investment resulted in better training capacity and more capable workers.

Contracting

The actual service agreements should cover scope, expected work product, compensation, expense reimbursement, confidentiality, conflicts of interest, insurance, ownership of work product, record retention, reporting, termination, and the limits of authority. Counsel and the CPA should also confirm the appropriate contractor classification and payment structure before engagement.

The Trust should not assume that a successful role must remain contracted forever. Some functions may always be better handled by outside firms; others may eventually justify a full-time employee or transition into a future permanent organization. That decision should follow the workload rather than be made in advance.

Concept-Stage Notice

This guide is for planning and professional review. It is not an employment agreement, an independent-contractor determination, a compensation plan, or a final delegation of fiduciary authority. Those matters should be documented by the appropriate professionals before any contractor is engaged.