This template is designed to help workforce system partners plan and execute effective work-based learning (WBL) strategies.

There are two critical elements in a successful work-based learning initiative:
1) an ample supply of employers willing to take training placements and
2) an ample supply of participants with the soft skills to interview well, generate employment offers and retain employment once hired.

**If either of these two critical elements is inadequate the entire effort will fail.**

By definition, work-based learning requires significant and continuous employer outreach and engagement. Workforce system partners should
leverage relationships already established by any of the partners as a potential site for work-based learning; while at the same time being careful
to approach and engage employers in a unified and coordinated manner that avoids multiple asks for the same project and the ensuring confusion associated with disjointed outreach efforts.

The following types of workforce system partners should be considered as a potential conduit to both employers and participants:

* Local Workforce Investment Areas
* WIA Providers of Case Management or Training
* Community Colleges
* Community Based Organizations
* Industry Associations
* Economic Development Organizations

This Basic Template includes sections on:

1. Establishing Employer Demand, Placement Opportunities and Participant Supply – Required – complete all rows shaded blue
2. Administrative Tasks – Recommended – Most are 1-time tasks to establish a process or create documents – complete relevant rows shaded red
3. Work-Based Learning by Type – Required for the type(s) of work-based learning in the project – complete relevant rows shaded green
*Rows in the Administrative and Work-Based Learning section not relevant to the project may be deleted.*

For projects in areas less experienced in WBL, use the full Step-By-Step template to ensure all key elements are considered.

|  | **Goal** | **Action Items** | **Specific Activity to Complete Action Items and Achieve Goals** | **Action Item Planned Start Date** | **Action Item Planned End Date** | **Organization and Staff Assigned** | **Estimated Time to Complete Prior to Start Date** | **Estimated Costs** | **Funding Source** | **Status** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ESTABLISH EMPLOYER DEMAND & PLACEMENT OPPORTUNITIES |
| 1 | Assess current employer relationships  | Create list of employers and catalog the strength of the existing relationship for each |  |  |  |  |  |  |  |  |
| 2 | Strengthen existing relationships | Reconnect with employers via meeting, phone, e-mail etc. |  |  |  |  |  |  |  |  |
| 3 | Generate new relationships | Outreach: meetings, job fairs, traditional and social media, web development, networking |  |  |  |  |  |  |  |  |
| 4 | Gauge demand for occupational skills and competencies | Analyze LMI & job posting data.Work with employers & placement agencies |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| ESTABLISH SYSTEM PARTICIPANT SUPPLY - REQUIRED |
| 5 | Assess current client flow  | Analyze current client base & enrollment patterns and assess need to prepare clients for WBL |  |  |  |  |  |  |  |  |
| 6 | Participant Soft-Skills Assessment | Testing |  |  |  |  |  |  |  |  |
| 7 | Participant Soft Skills Training | Training |  |  |  |  |  |  |  |  |
| 8 | Participant Math & Reading Assessment | Administer TABE test(s) and review TABE results |  |  |  |  |  |  |  |  |
| 9 | Participant Remedial Ed. | Contextualized Bridge Program |  |  |  |  |  |  |  |  |
| 10 | Employer Prep |  |  |  |  |  |  |  |  |  |
|  A |  HR Staff Prep | Review forms, policies and procedures with employers prior to attempting placement |  |  |  |  |  |  |  |  |
|  B |  Line Supervisor  Prep | Review responsibilities and expectations with supervisor |  |  |  |  |  |  |  |  |
| 11 | Review statutory, regulatory & policy requirements | Review policy, best practices & lessons learned |  |  |  |  |  |  |  |  |
| ADMINISTRATIVE TASKS |
| 12 | Develop WBL agreement templates with menu checklists | Adapt templates provided to meet regional needs |  |  |  |  |  |  |  |  |
| 13 | Develop evaluation tools | Adapt templates to meet regional needs |  |  |  |  |  |  |  |  |
| 14 | Develop time-keeping forms | Adapt templates to meet regional needs |  |  |  |  |  |  |  |  |
| 15 | Establish Insurance Coverage Options | Create process for handling participant insurance based on type of WBL |  |  |  |  |  |  |  |  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
| ACTIVITIES FOR SPECIFIC WORK-BASED LEARNING OPTIONS |
| **On-the-Job Training** |
| 16 | Identify specific OJT placement opportunities | Employer outreach |  |  |  |  |  |  |  |  |
| 17 | Identify and select participants with most potential for success | Participant review & selection |  |  |  |  |  |  |  |  |
| 18 | Skill Gap Analysis | Obtain required skills and competencies by position.Conduct gap analysis for each individual based on required skills and competencies. |  |  |  |  |  |  |  |  |
| 19 | Establish training plan | Complete training plan template |  |  |  |  |  |  |  |  |
| 20 | Identify trainer | Enroll participant in training program |  |  |  |  |  |  |  |  |
| 21 | Sign Contract | Execute contract based on training plan |  |  |  |  |  |  |  |  |
| 22 | Track work time for reimbursement | Obtain and review time sheets and payroll records |  |  |  |  |  |  |  |  |
| 23 | Track progress to goals | Site visits, desk reviews of progress toward training plan completion |  |  |  |  |  |  |  |  |
| 24 | Evaluate | Use evaluation tool to assess each placement, modify forms or program design as needed |  |  |  |  |  |  |  |  |
| **Internship** |
| 25 | Identify employer partners | Outreach campaign |  |  |  |  |  |  |  |  |
| 26 | Identify academic partners | Review & analyze organizations and programs of study; create list |  |  |  |  |  |  |  |  |
| 27 | Establish academic credit guidelines | Complete academic plan with credit earned for internships |  |  |  |  |  |  |  |  |
| 28 | Recruit students | Conduct various outreach efforts and assess applicants |  |  |  |  |  |  |  |  |
| 29 | Establish competency goals | Work with employer and academic institution to design program of study |  |  |  |  |  |  |  |  |
| 30 | Sign contract | Execute contract based on training plan |  |  |  |  |  |  |  |  |
| 31 | Track progress toward goals | Site visits, desk reviews of progress toward training plan completion |  |  |  |  |  |  |  |  |
| 32 | Evaluate | Use evaluation tool to assess each placement |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
| **Work Experience** |
| 33 | Identify employer partners | Outreach campaign |  |  |  |  |  |  |  |  |
| 34 | Identify participants | Participant review & selection |  |  |  |  |  |  |  |  |
| 35 | Establish goals | Work with employer and participant to design program of study |  |  |  |  |  |  |  |  |
| 36 | Sign contract | Execute contract based on training plan |  |  |  |  |  |  |  |  |
| 37 | Track progress  | Site visits, desk reviews of progress toward training plan completion |  |  |  |  |  |  |  |  |
| 38 | Evaluate | Use evaluation tool to assess each placement |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| 39 | Identify employer partners | Outreach campaign |  |  |  |  |  |  |  |  |
| 40 | Identify participants | Participant review & selection |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| 41 | Establish goals | Work with employer and participant to design program of study |  |  |  |  |  |  |  |  |
| 42 | Sign contract | Execute contract based on training plan |  |  |  |  |  |  |  |  |
| 43 | Track progress  | Site visits, desk reviews of progress toward training plan completion |  |  |  |  |  |  |  |  |
| 44 | Evaluate | Use evaluation tool to assess each placement |  |  |  |  |  |  |  |  |