



WORK-BASED LEARNING INSTRUCTION GUIDE

**A CURRICULUM GUIDE
FOR WORKPLACE COMPETENCY DEVELOPMENT AND
EMPLOYMENT SEARCH AND INTERVIEW TECHNIQUES**

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To order copies of the Guide, contact: Doris Lux, Central Community College-Columbus, PO Box 1027, Columbus, NE 68602-1027, 402-562-1242, (fax) 402-562-1201, dlux@cccneb.edu. The Guide is also available on the Work Based Learning web site at <http://www.nde.state.ne.us/TECHPREP/WBL>.

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FOREWORD/ACKNOWLEDGMENTS

This *Nebraska Work-Based Learning (WBL) Instruction Guide* has been written at the request of many Nebraska WBL coordinators who are experiencing the challenges of developing and implementing effective work-based learning experiences—experiences that assess both academic and technical competency attainment. The activities and assessments in the *Guide* may be used in a classroom that focuses exclusively on WBL competency development or integrated into the curriculum of a wide variety of classroom, e.g., English, social studies, marketing, business, etc. Activities are appropriate for both secondary and postsecondary audiences.

The *Guide* is intended as a companion document to the *Nebraska Work Based Learning Manual* (1998) which describes how to structure the work-site component, but does not address the content of the school-site instruction that completes the entire WBL program. **Ordering information for both of these publications is found at the end of the Introduction section of this *Guide*.**

In preparation for creating this document, one primary resource was used to guide the overall design — the *Massachusetts Work-Based Learning Plan Instruction Module*. We gratefully acknowledge the creators of the Massachusetts plan for allowing us to adapt their learning plan for Nebraska, including their nine competency assessment model. A copy of the *Massachusetts Work-Based Learning Plan Instruction Module* can be obtained by contacting Kerrie Anastas, Massachusetts Office for School and Career Transition, 350 Main Street, Malden, MA 02148, 781-388-3382.

The *Guide* was written and reviewed by a panel of experts in developing and implementing quality work-based learning programs. We acknowledge the time and expertise of the following individuals:

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INTRODUCTION

Overview of the WBL Instruction Guide

The *WBL Instruction Guide* is a tool to help the school coordinator, student, and employer set clear goals and expectations so that the experience is a positive and productive activity for both employer and student. The *Guide* is divided into four major components that reflect its major purposes.

Part I Workplace Competency Development

The purpose of Part I is to help teachers/schools design a competency-based school site learning experience that will enable students to develop the competencies required for success in the 21st century workplace. The school site learning is intended to complement the student-learners' work site learning experience. It focuses on the Individual, Team, and Personal/Professional Competency development of the student and incorporates all of the SCANS competency areas and foundation skills into nine competency areas consisting of 27 assessments. This competency-based approach puts the student at the center of the learning with clear expectations that they take an active role in the learning process.

Part II Employment Search and Interview Techniques

The purpose of Part II is to provide students with the personal and technical knowledge and skills needed to conduct a job search, complete job applications, prepare an effective resume and cover letter, compile a comprehensive portfolio, successfully interview and negotiate for salary and benefits, and appropriately leave a job.

Part III Secondary Cooperative Education/Diversified Occupations Programs

The purpose of Part III is to provide a model for developing a comprehensive work-based learning program that meets Nebraska program standards. The process for identifying appropriate work sites and sample forms for operating the program could be modified to fit a wide variety of work-based learning experiences. This model meets the requirements set forth in the Fair Labor Standards Act for limited employment of students under the age of 18 in hazardous occupations.

Part IV Occupationally Specific Skills Development

The purpose of Part IV is to provide a resource for WBL coordinators, especially Diversified Occupations Teacher/Coordinators, to use in developing student instruction in a variety of occupationally specific skills areas.

Work-Based Learning Defined

Work-based learning (WBL) takes place at both the work site and school site and is an instructional strategy that makes lifelong career development easier and more natural by linking learning at school to application of learning at the work site.

- **Work site learning** occurs in a business or community organization away from school.
- **School site learning** focuses on academic career preparation as part of the classroom curriculum.

These two activities combine to create a lifelong process of career development stretching from preschool to adulthood.

Why Work-Based Learning?

Many students leave school ill-prepared for the workplace. Poor academic skills and work habits may limit students' understanding of how they might fit into the world of work. WBL addresses this problem by extending the walls of the classroom to include the whole community, giving students the opportunity to apply academic and occupational skills in the workplace.

Through WBL, "Employers reinforce academic lessons, schools emphasize career applications, and students gain experience in the adult world of work and connections to a range of postsecondary options, including college, technical training, and skilled entry-level work." (Jobs for the Future, Cambridge, MA)

Sequence and Scope of WBL Activities

Most people experience four overlapping stages in their career selection and preparation process: career awareness, career exploration, school site career preparation, and work site career applications. WBL activities are designed to help students move through these stages and learn about the world of work and their place in it. These four stages provide a framework for understanding the sequence and scope of work based learning activities and when activities may be appropriate for students.

Stages in the Career Selection and Preparation Process	
<i>Stage</i>	<i>Type of Activities</i>
<p>Career Awareness</p> <p>Career awareness often focuses on <i>group</i> activities that help students develop a general awareness of themselves, the world of work and its connection to education.</p>	<ul style="list-style-type: none"> ◆ Career Fair/Career Day ◆ Classroom Guest Speakers ◆ Field Trips (Business/Industry Tours)
<p>Career Exploration</p> <p>Career exploration activities provide an opportunity for <i>individual</i> examination of career options that match a student's interests and aptitudes. They provide an opportunity for students to learn about what people do for a living and to observe and interact with work based staff to learn more about the demands of the work place.</p>	<ul style="list-style-type: none"> ◆ Career Guidance and Counseling Services ◆ Career Interviews ◆ Job Shadowing ◆ Research Papers/Projects

Stages in the Career Selection and Preparation Process	
<i>Stage</i>	<i>Type of Activities</i>
<p style="text-align: center;">School-Site Career Preparation</p> <p>School site activities that integrate academic and occupational skills learned in the classroom with skills learned on the job prepare students for transitioning from school to a career. Emphasis is on skill building, understanding the concept of transferable skills, learning to work as a team member, establishing relationships, ethics and honesty, and relating personal interests and abilities to real world career opportunities. Many students also select a career interest or focus during this stage.</p>	<ul style="list-style-type: none"> ◆ Applied Academics Courses ◆ Career Academies ◆ Entrepreneurship Class /Project ◆ School-Based Enterprises ◆ Tech Prep Programs/Articulation ◆ Career and Technical Education Student Organization (CTSO) Projects or Competition ◆ Career and Technical Education Programs ◆ Workplace Readiness Courses
<p style="text-align: center;">Work-Site Career Application</p> <p>Work site career applications are competency-based educational experiences that occur at the workplace but are tied to the classroom by curriculum that coordinates and integrates school-site instruction with work site experiences. These structured work experiences provide students with the opportunity to apply the skills learned in the classroom in actual work environments and prepare students for the next step in their career development, whether it be a two-year or four-year college, apprenticeship, or career.</p>	<ul style="list-style-type: none"> ◆ Apprenticeship ◆ Clinical Work Experience ◆ Cooperative Education (COOP) ◆ Internship/Practicum ◆ Mentorships ◆ Part Time Work ◆ Service Learning Projects ◆ Supervised Agricultural Experiences (SAE) ◆ Work Experience Career Exploration Programs (WECEP)

This *Guide* focuses on developing and implementing effective work-based learning experiences—experiences that assess both academic and technical competency attainment—by formally linking the School-Site Career Preparation and Work-Site Career Application stages.

What Work Requires of Schools

In 1991, based on research conducted by the Secretary of Labor’s Commission on Achieving the Necessary Skills (SCANS), the U.S. Department of Labor released the SCANS report, *What Work Requires of Schools*. The report discussed the changes the U.S. economy and workplaces were undergoing and the subsequent need for all students to develop particular competencies and foundation skills required for success in the new world of work.

The three areas of SCANS *foundation skills* are (1) basic skills (reading, writing, mathematics, listening, speaking), (2) thinking skills (creative thinking, decision making, problem solving, knowing how to learn, reasoning), and (3) personal qualities (responsibility, self-esteem, sociability, self-management, integrity). The five SCANS *competency areas* are (1) use of resources, (2) interpersonal skills, (3) use of information, (4) knowledge of how systems work, and (5) facility with new technologies (see page 2). The content of the SCANS report became a guideline for educators and others developing or revising education and training programs and curriculum in schools and other education settings.

The following tables provide detailed descriptions of the SCANS Foundation Skills and Competency Areas.

SCANS Workplace Competencies

Teaching the SCAN Competencies, The Secretary's Commission
on Achieving Necessary Skills, U.S. Department of Labor, 1993

THE FOUNDATIONS	Basic Skills	<ul style="list-style-type: none"> ◆ <i>Reading</i> - locates, understands, and interprets written information in prose and in documents such as manuals, graphs, and schedules ◆ <i>Writing</i> - communicates thoughts, ideas, information, and messages in writing; and creates documents such as letters, directions, manuals, reports, graphs, and flow charts ◆ <i>Arithmetic/Mathematics</i> - performs basic computations and approaches practical problems by choosing appropriately from a variety of mathematical techniques ◆ <i>Listening</i> - receives, attends to, interprets, and responds to verbal messages and other cues ◆ <i>Speaking</i> - organizes ideas and communicated orally
	Thinking Skills	<ul style="list-style-type: none"> ◆ <i>Creative Thinking</i> - generates new ideas ◆ <i>Decision Making</i> - specific goals and constraints, generates alternatives, considers risks, evaluates and chooses best alternative ◆ <i>Problem Solving</i> - recognizes problems and devises and implements plan of action ◆ <i>Seeing Things in the Mind's Eye</i> - organizes, and processes symbols, pictures, graphs, objects and other information ◆ <i>Knowing How to Learn</i> - uses efficient learning techniques to acquire and apply new knowledge and skills ◆ <i>Reasoning</i> - discovers a rule or principle underlying the relationship between two or more objects and applied it when solving a problem
	Personal Qualities	<ul style="list-style-type: none"> ◆ <i>Responsibility</i> - exerts a high level of effort and perseveres towards goal attainment ◆ <i>Self-Esteem</i> - believes in own self-worth and maintains a positive view of self ◆ <i>Sociability</i> - demonstrates understanding, friendliness, adaptability, empathy, and politeness in group settings ◆ <i>Self-Management</i> - assesses self accurately, sets personal goals, monitors progress, and exhibits self-control ◆ <i>Integrity/Honesty</i> - chooses ethical courses of action

SCANS Workplace Competencies

Teaching the SCAN Competencies, The Secretary's Commission
on Achieving Necessary Skills, U.S. Department of Labor, 1993

<p>COMPETENCIES</p> <p>Effective workers can productively use</p>	Resources	<ul style="list-style-type: none"> ◆ <i>Time</i> - Selects goal-relevant activities, ranks them, allocates time, and prepares and follows schedules ◆ <i>Money</i> - Uses or prepares budgets, makes forecasts, keeps records, and makes adjustments to meet objectives ◆ <i>Materials and Facilities</i> - Acquires, stores, allocates, and uses materials or space efficiently ◆ <i>Human Resources</i> - Assesses skills and distributes work accordingly, evaluates performance and provides feedback.
	Inter-personal Skills	<ul style="list-style-type: none"> ◆ <i>Participates as Member of a Team</i> - contributes to group effort ◆ <i>Teaches Others New Skills</i> ◆ <i>Serves Clients/Customers</i> - works to satisfy customers' expectations ◆ <i>Exercises Leadership</i> - communicates ideas to justify position, persuades and convinces others, responsibly challenges existing procedures and policies ◆ <i>Negotiates</i> - works toward agreements involving exchange of resources, resolves divergent interests ◆ <i>Works with Diversity</i> - works well with men and women from diverse backgrounds
	Information	<ul style="list-style-type: none"> ◆ <i>Acquires and Evaluates Information</i> ◆ <i>Organizes and Maintains Information</i> ◆ <i>Interprets and Communicates Information</i> ◆ <i>Uses Computers to Process Information</i>
	System	<ul style="list-style-type: none"> ◆ <i>Understands Systems</i> - knows how social, organizational, and technological systems work and operates effectively with them ◆ <i>Monitors and Corrects Performance</i> - distinguishes trends, predicts impacts on system operations, diagnoses deviations in systems' performance and corrects malfunctions ◆ <i>Improves or Designs Systems</i> - suggests modifications to existing systems and develops new or alternative systems to improve performance
	Technology	<ul style="list-style-type: none"> ◆ <i>Selects Technology</i> - chooses procedures, tools or equipment including computers and related technologies ◆ <i>Applies Technology to Task</i> - understands overall intent and proper procedures for setup and operation of equipment ◆ <i>Maintains and Troubleshoots Equipment</i> - Prevents, identifies, or solves problems with equipment, including computers and other technologies.

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PART I

WORKPLACE COMPETENCY DEVELOPMENT

Overview

Part I focuses on the individual, team, and personal/professional competency development of the student and incorporates all of the SCANS competency areas and foundation skills into nine competency areas consisting of 27 assessments. Competency-based programs puts the student at the center of the learning with clear expectations that they take an active role in the learning process. Several learning activities are provided for each of the 27 assessments. In addition, an extensive list of print, video, online, and Internet resources is included for each competency.

Workplace Competency Learning Plan

The students' Workplace Competency Learning Plan provides a tool for helping students and teachers manage learning. The learning plan covers what will be learned, how and when it will be learned, as well as how to judge whether it has been learned. This strategy shifts the responsibility for achieving learning goals from the teacher to the student.

WORKPLACE COMPETENCY DEFINITIONS		
INDIVIDUAL COMPETENCIES	1. Communication and Literacy	The student demonstrates the ability to speak, listen, read, and write to function successfully at the work site.
	2. Organizing and Analyzing Information	The student gathers, organizes, and evaluates the meaning of documents and information
	3. Problem Solving	The student identified problems, understands their context and develops solutions.
	4. Using Technology	The student participates fully in a task or project from initiation to completion, using appropriate time-management skills.
	5. Completing Entire Activities	The student participates fully in a task or project from initiation to completion.
TEAM COMPETENCIES	6. Acting Professionally	The student meet workplace standards on attendance, punctuality, dress-code, confidentiality, flexibility and self-control.
	7. Interacting with Others	The student works professionally and respectfully with a diversity of co-workers, supervisors and customers, resolving conflicts in a constructive manner.
	8. Understanding All Aspects of the Industry	The student understands the structure and dynamics of the entire organization, health and safety issues in the industry and the role of the business within the larger economy.
PERSONAL & PROFESSIONAL DEVELOPMENT COMPETENCIES	9. Taking Responsibility for Career and Life Choices	The student balances demands of work, school and personal life and takes responsibility for developing his or her own personal and professional growth.

Using the Workplace Competency Learning Plan

The goal of the *Workplace Competency Learning Plan* (pages I-7-8) is to promote and measure growth in general skill areas called competencies. You may find that only a few of the competencies match the job or internship a student is performing. If so, identify those competencies and use only those competency assessments that apply to the situation.

Initial and Follow Assessment

Once appropriate competencies have been identified for a specific learning experience, the following process should be followed:

- Step # 1 Initial assessment of the student's competency level prior to the WBL experience. Complete the Workplace Competency Summary Sheet for Initial Review (page I-9).
- Step # 2 Setting goals for student to reach during the WBL experience (see pages I-10-18)
- Step # 3 Follow up assessment of student's competency level to document learning and productivity gain during the WBL experience. Complete the Workplace Competency Assessment Summary Sheet for Followup Review (see page I-9).

**Workplace Competency Learning Plan
ASSESSMENT TIMETABLE**

Short-Term Placements (2-8 Weeks)

The objective is to measure the student's skill development within a relatively short period. Focus on a few of the competencies and rate the student twice, at the beginning and end of the experience. The supervisor and student can focus on attaining realistic goals using this suggested time line. It requires getting started quickly in order to maximize the benefits of the process. You may need to adapt it to the needs of your particular work site.

Time Frame	Activity
Before Employment	<ul style="list-style-type: none"> • Identify job description and tasks to be completed. • Pick the 3-5 competencies most critical to the job. • Share job description and competencies with student during job interview (if appropriate/applicable). • Complete cover sheet. Pull out work sheets for competencies selected and attach to cover and summary sheets.
1st Week of Employment	<ul style="list-style-type: none"> • Observe student's performance on assigned tasks and projects.
2nd Week of Employment	<ul style="list-style-type: none"> • Conduct initial evaluation meeting with student; share your rating with student; set goals in competency areas.
Throughout Employment	<ul style="list-style-type: none"> • Reinforce performance goals throughout the duration of the placement
Final Week of Employment	<ul style="list-style-type: none"> • Conduct the final assessment meeting; share the level of competency that the student has achieved.

Extended Placements (8 Weeks or Longer)

The objective is to promote and measure the student's growth over a substantial length of time. Because there is more time than a short-term placement, more competency areas can be addressed. To cover this ground successfully, observe the student's performance for a longer period (one or two months) before making the initial assessment. Then, regular follow-up assessments (quarterly, for example) are made to ensure student's progress.

Before Employment	<ul style="list-style-type: none"> • Develop job description and tasks to be completed. • Share these with students during job interview.
1st One or Two Months of Employment	<ul style="list-style-type: none"> • Observe the student's performance on the job. • Assess level in as many competencies as you can. • Conduct an initial evaluation meeting, sharing assessment with student, setting performance goals.
Quarterly	<ul style="list-style-type: none"> • Follow-up with subsequent assessment meetings, acknowledging growth and setting goals where applicable.
Throughout Employment	<ul style="list-style-type: none"> • Reinforce goals with student.
Final Week of Employment (or at appropriate intervals)	<ul style="list-style-type: none"> • Conduct the final assessment meeting; share the level of competency that the student has achieved.

Assessing Student Competency Levels

Competency Rating Scale

The Workplace Competency Learning Plan has nine competencies and 2-4 assessments for each competency for a total of 27 assessments.

The Learning Plan has four rating levels in each competency area:

Needs Development	Competent	Proficient	Advanced
--------------------------	------------------	-------------------	-----------------

- Each competency has a one-page assessment that breaks the competency into specific student performance.
- Rate the student in each skill by checking the appropriate box in each section which most closely matches the student.
- Once you have rated the student in each section of the competency, estimate the overall average rating in the competency and indicate it by checking a rating on the corresponding summary sheet.
- Record any comments and goals for progress in the marked space.

Common Questions

What if a student performs between rating levels? You may complete a worksheet and notice that you have checked one box at the Competent level and one at Proficient and yet another at Needs Development. Many supervisors ask how to rate a student in this situation. Use your best judgment to estimate a rating. If a student is truly between ratings in a competency, you should choose the lower rating at an initial evaluation because a student then has an attainable goal of reaching the higher level by the time of the next evaluation. If you set clear goals in the competency, the student will be able to achieve the next level by the next assessment. Seeing measurable progress gives the student a sense of satisfaction and reinforces the idea that he or she can achieve goals.

How are assessments shared with the student?

- Be direct and honest about strengths and weaknesses. Teenagers need honest feedback about their performance. Clarity about goals and expectations is also a critical component of student success.
- Invite the career specialist or teacher to meet with you at the work site if you are uncomfortable about communicating your feedback to the student.
- Verbal reinforcement of goals, objectives and progress between assessments is important. Regular communication on these topics will make it easier for you to give challenging feedback. It will also make for a more comfortable and productive relationship.

What is the student's role in the process?

- Explain the process to the student, so he or she knows what to expect.
- Let the student develop his or her own Learning Plan, either with you, or simultaneously while you develop your version. Students quite often are close to their supervisors in their description of the job, their choice of competencies and even in how they rate themselves. This type of active participation heightens the student's self-awareness and understanding of what he or she can get out of the work experience.

- Involve the student in the goal-setting process. It can be very difficult for students to take the initiative and ask to work on a new project or task. An assessment meeting is often a good time to let the student know that you are interested in his or her development at the work site.

An Example: Rating the Student in Competency # 1

Below is a hypothetical scenario to demonstrate how to rate a student in a competency.

Jeff has been in Corporate Accounts Department for four weeks. He is assigned various data entry, filing and delivery duties. When he began, he was timid and quiet. Now he is comfortable with his co-workers. He speaks more in a sociable way and is always polite. He does not speak very much about his assignments or issues occurring in the department. He generally listens respectfully to instructions, but his supervisor is not always sure he understands. When his supervisor asks him to type a memo regarding his accomplishment last week, however, he produces a document in which his grammar and punctuation are fairly good. Since then, his supervisor has considered giving him more writing assignments.

Rating Jeff:

Start with Competency #1, Communicate and Understand Ideas and Information.

- In *Speaking*, he seems to fall between Needs Development, “Learning to speak clearly, audibly and courteously,” and Competent, “Speaks clearly and uses language appropriate to the environment both in person and on the phone.” He would be rated as Needs Development and given goals of speaking more often, especially about word-related issues, and learning the vocabulary used in the department.
- In *Listening*, he does “make eye contact,” but does not “repeat instructions to confirm understanding,” which define Competent, so he would be rated Needs Development, “Developing listening skills, working to make eye contact and confirm understanding.” His goal here would be to repeat instructions to his supervisor after he heard them, which, if accomplished, would bring him to the Competent level at the next evaluation.
- In *Reading*, it is unclear what his reading level is from this example, so he cannot be rated. He should be given some reading during the next evaluation period to assess his level.
- In *Writing*, his performance most closely matches the description under Competent, “Writes clearly with correct grammar,” so you would check that box.

In this competency, the overall rating would be Needs Development, since he received this rating in two out of three skills that could be rated, and received Competent in the third. He is an example of a student who could move up a level—to Competent—for the next assessment by achieving specific goals, such as taking the initiative to communicate, repeating instructions after he heard them and learning to use department terminology.

**Workplace Competency Assessment
Sample Forms**

Form	Purpose	Page #
Workplace Competency Learning Plan	This form is completed for each student to delineate what will be learned, how and when it will be learned, as well as how to judge whether it has been learned.	I - 7-8
Workplace Competency Assessment Summary Sheet	This form is used for both the “Initial” and “Follow up” assessment of student competencies.	I - 9
Assessment of Workplace Competency # 1 - Communication & Literacy	These forms are used to set student goals and to assess student competency development as a result of both the school-site and work-site learning experiences.	I - 10
Assessment of Workplace Competency # 2 - Organizing & Analyzing Information		I - 11
Assessment of Workplace Competency # 3 - Problem Solving		I - 12
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Assessment of Workplace Competency # 9 - Taking Responsibility for Career and Life Choices		I - 18

Workplace Competency Learning Plan

Student: _____ ID# _____ School: _____

Supervisor: _____ Company: _____

Student's Job Title: _____ Career Specialist/Teacher: _____

Step 1: Write a brief (2-4 sentences) job description here:

Step 2: Review the 9 competencies listed below. Pick the competency(ies) that are most applicable to the student's job and pull the applicable pages(s).

I. Individual	II. Team
1. Communication and Literacy a. Speaking b. Listening c. Reading d. Writing	6. Acting Professionally a. Attendance and Appearance b. Accepting Direction and Criticism c. Flexibility and Maintaining Self-Control d. Respecting Confidentiality
2. Organizing and Analyzing Information a. Collecting and Organizing Information b. Research and Analysis c. Quantitative Analysis and Mathematics	7. Interacting With Others a. Interacting with Customers/Clients b. Interacting with Co-workers c. Managing Stress and Conflict d. Respecting Diversity
3. Problem Solving a. Identifying Problems b. Solving Problems	8. Understanding All Aspects of the Industry a. Understanding the Structure and Dynamics of the Entire Organization b. Recognizing Health and Safety Issues c. Understanding Personnel Policy and the Labor/Management Relationship
4. Using Technology a. Using Work Tools and Office Equipment b. Computer Operation	
5. Completing Entire Activities a. Initiating and Completing Projects b. Time Management	III. Personal and Professional Development
	9. Taking Responsibility for Career and Life Choices a. Teaching and Learning on an Ongoing Basis b. Balancing Personal, Professional and Academic Responsibilities c. Setting Career Goals

Step 3: In more detail, list 5-7 objectives, tasks, and/or projects that the student must accomplish at work and list the corresponding competency(ies) that correlates to that task/project.

Task	Competency(ies) (E.g.: 1c, 3a,b; 7a)
1.	
2.	
3.	
4.	
5.	
6.	
7.	

Step 4. Initial Review: After 1-2 weeks on the job, rate the student by checking the appropriate boxes on the individual competency sheet(s) (pages I-10-18). Set goals with the student in the chosen competency area(s) and write these in the boxes marked “Goals.” After completing individual sheet(s), record the rating on the Summary Sheet (page I-9).

Step 5. Follow Up Review: At the end of the job, or at appropriate intervals, meet with the student again to revisit the competencies. Discuss which goals the student has met and which the student may want to continue working on in other areas. Rate the overall competency level on the Summary Sheet (page I-9) to assess the student’s growth.

Step 6. After each review, have the appropriate people sign and date the Summary Sheet.

Workplace Competency Assessment SUMMARY SHEET

Student: _____ ID# _____ School: _____

Supervisor: _____ Company: _____

Student's Job Title: _____

WBL Coordinator: _____

Competencies		Needs Development	Competent	Proficient	Advanced
1. Communication and Literacy: The student demonstrates the ability to speak, listen, read, and write to function successfully at the work site.	Initial Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow Up Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Organizing and Analyzing Information: The student gathers, organizes, and evaluates the meaning of documents and information.	Initial Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow Up Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Problem Solving: The student identifies problems, understands their context and develops solutions.	Initial Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow Up Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Using Technology: The student identifies and applies appropriate technologies.	Initial Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow Up Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Completing Entire Activities: The student participates fully in a task or project from initiation to completion, using appropriate time-management skills.	Initial Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow Up Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Acting Professionally: The student meets workplace standards on attendance, punctuality, dress-code, confidentiality, flexibility and self-control.	Initial Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow Up Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Interacting with Others: The student works professionally and respectfully with a diversity of co-workers, supervisors and customers, resolving conflicts in a constructive manner.	Initial Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow Up Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Understanding All Aspects of the Industry: The student understands the structure and dynamics of the entire organization, health and safety issues in the industry and the role of the business within the larger community.	Initial Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow Up Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Taking Responsibility for Career and Life Choices: The student balances demands of work, school and personal life and takes responsibility for developing his or her own personal and professional growth.	Initial Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow Up Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Student Signature Initial Review Date Follow Up Review Date

Parent Signature Initial Review Date Follow Up Review Date

Supervisor Signature Initial Review Date Follow Up Review Date

WBL Coord. Signature Initial Review Date Follow Up Review Date

ASSESSMENT OF COMPETENCY **1** *Communication and Literacy*

Student: _____ ID# _____ School: _____
 Supervisor: _____ Company: _____
 Student's Job Title: _____ Career Specialist/Teacher: _____
 First Review Date: _____ Second Review Date: _____

In each row, please check ONE phrase that best describes the student's performance.

NEEDS DEVELOPMENT	COMPETENT	PROFICIENT	ADVANCED
1a. Speaking			
<input type="checkbox"/> Learning to speak clearly, audibly and courteously.	<input type="checkbox"/> Speaks clearly and uses language appropriate to the environment both in person and on the telephone.	<input type="checkbox"/> Expresses complex ideas in an organized and concise manner.	<input type="checkbox"/> Presents effectively to a group using well-organized format, concise language and clear enunciation.
<i>ΔComments:</i>			
1b. Listening			
<input type="checkbox"/> Developing listening skills; working to make eye contact and confirm understanding.	<input type="checkbox"/> Listens attentively; makes eye contact; repeats instructions to confirm understanding.	<input type="checkbox"/> Listens attentively and demonstrates understanding through relevant responses and questions.	<input type="checkbox"/> Retains complex information over time and applies it to later work.
<i>ΔComments:</i>			
1c. Reading			
<input type="checkbox"/> Reads written directions and workplace documents with assistance.	<input type="checkbox"/> Reads written directions and workplace documents independently.	<input type="checkbox"/> Reads and understands written materials, including technical documents, independently; asks questions where appropriate.	<input type="checkbox"/> Reads complex written materials and executes related tasks independently.
<i>ΔComments:</i>			
1d. Writing			
<input type="checkbox"/> Learning to write clearly with correct grammar.	<input type="checkbox"/> Writes clearly with correct grammar.	<input type="checkbox"/> Writes clearly using work-related terminology	<input type="checkbox"/> Writes and develops professional material such as newsletters and marketing brochures.
<i>ΔComments:</i>			
<i>Goals:</i>			

ASSESSMENT OF COMPETENCY **2** Organizing and Analyzing Information

Student: _____ ID# _____ School: _____
 Supervisor: _____ Company: _____
 Student's Job Title: _____ Career Specialist/Teacher: _____
 First Review Date: _____ Second Review Date: _____

In each row, please check ONE phrase that best describes the student's performance.

NEEDS DEVELOPMENT	COMPETENT	PROFICIENT	ADVANCED
2a. Collecting and Organizing Information			
<input type="checkbox"/> Developing ability to collect and organize information and material needed for a task.	<input type="checkbox"/> Effectively compiles information and resources, including via the Internet.	<input type="checkbox"/> Effectively organizes and evaluates the relevance and accuracy of information.	<input type="checkbox"/> Identifies and obtains missing information based on mastery of subject.
<i>ΔComments:</i>			
2b. Research and Analysis			
<input type="checkbox"/> Developing a familiarity with pertinent information and its location.	<input type="checkbox"/> Researches and synthesizes information from a variety of sources.	<input type="checkbox"/> Analyzes, interprets and draws conclusions from a variety of information types and sources.	<input type="checkbox"/> Develops theories of action and tests them in practice.
<i>ΔComments:</i>			
2c. Quantitative Analysis and Mathematics			
<input type="checkbox"/> Performs simple calculations—addition and subtraction—with and without a calculator.	<input type="checkbox"/> Applies basic math, including multiplication and division, to complete appropriate tasks.	<input type="checkbox"/> Demonstrates understanding of quantitative or geometric applications by calculating fractions, percentages, angles or other mathematical relationships.	<input type="checkbox"/> Applies advanced math, such as statistics, accounting or probability to complete assignments and test hypotheses. Presents quantitative analyses through graphs and charts.
<i>ΔComments:</i>			

Goals:

ASSESSMENT OF COMPETENCY **3** Problem Solving

Student: _____ ID# _____ School: _____
 Supervisor: _____ Company: _____
 Student's Job Title: _____ Career Specialist/Teacher: _____
 First Review Date: _____ Second Review Date: _____

In each row, please check ONE phrase that best describes the student's performance.

NEEDS DEVELOPMENT	COMPETENT	PROFICIENT	ADVANCED
3a. Identifying Problems			
<input type="checkbox"/> Identifies problems with help from supervisor.	<input type="checkbox"/> Identifies problems independently.	<input type="checkbox"/> Explores cause of problems and evaluates impact on various stakeholders.	<input type="checkbox"/> Identifies potential problems and proposes preventive action.
<i>ΔComments:</i>			
3b. Solving Problems			
<input type="checkbox"/> Solves problems with help from supervisor.	<input type="checkbox"/> Solves simple problems independently.	<input type="checkbox"/> Explores options and considers several alternative solutions when solving problems.	<input type="checkbox"/> Develops hypotheses and proposes creative solutions and systemic change, including preventive action.
<i>ΔComments:</i>			

Goals:

ASSESSMENT OF COMPETENCY **4** *Using Technology*

Student: _____ ID# _____
 Supervisor: _____
 Student's Job Title: _____
 First Review Date: _____

School: _____
 Company: _____
 Career Specialist/Teacher: _____
 Second Review Date: _____

In each row, please check ONE phrase that best describes the student's performance.

NEEDS DEVELOPMENT	COMPETENT	PROFICIENT	ADVANCED
4a. Using Work Tools and Office Equipment			
<input type="checkbox"/> Uses work tools and/or basic office equipment with supervision.	<input type="checkbox"/> Uses work tools and/or office equipment independently.	<input type="checkbox"/> Trouble shoots and solves problems using work tools and/or office equipment.	<input type="checkbox"/> Takes initiative in maintaining tools/equipment and/or seeing to it that they are repaired.
<i>ΔComments:</i>			
4b. Computer Operation			
<input type="checkbox"/> Learning basic computer skills.	<input type="checkbox"/> Demonstrates basic computer skills.	<input type="checkbox"/> Uses appropriate software to complete assignments.	<input type="checkbox"/> Applies appropriate software innovatively to improve organization's productivity.
<i>ΔComments:</i>			

Goals:

ASSESSMENT OF COMPETENCY **5** *Completing Entire Activities*

Student: _____ ID# _____ School: _____
 Supervisor: _____ Company: _____
 Student's Job Title: _____ Career Specialist/Teacher: _____
 First Review Date: _____ Second Review Date: _____

In each row, please check ONE phrase that best describes the student's performance.

NEEDS DEVELOPMENT	COMPETENT	PROFICIENT	ADVANCED
5a. Initiating and Completing Projects			
<input type="checkbox"/> Completes tasks and projects as assigned with supervision.	<input type="checkbox"/> Completes tasks and projects as assigned.	<input type="checkbox"/> Initiates and completes projects independently.	<input type="checkbox"/> Delivers high-quality results on schedule.
<i>Comments:</i>			
5b. Time Management			
<input type="checkbox"/> Meets assigned deadlines with supervision.	<input type="checkbox"/> Meets assigned deadlines independently.	<input type="checkbox"/> Sets priorities and deadlines independently.	<input type="checkbox"/> Manages multiple tasks and projects effectively.
<i>Comments:</i>			

Goals:

ASSESSMENT OF COMPETENCY **6** *Acting Professionally*

Student: _____ ID# _____ School: _____
 Supervisor: _____ Company: _____
 Student's Job Title: _____ Career Specialist/Teacher: _____
 First Review Date: _____ Second Review Date: _____

In each row, please check ONE phrase that best describes the student's performance.

NEEDS DEVELOPMENT	COMPETENT	PROFICIENT	ADVANCED
6a. Attendance and Appearance			
<input type="checkbox"/> Maintains consistent attendance, punctuality, and appropriate dress with supervision.	<input type="checkbox"/> Maintains consistent attendance, punctuality, and appropriate dress independently.	<input type="checkbox"/> Is a model of excellent attendance and dress; attends events beyond those required.	<input type="checkbox"/> Represents organization at meetings and events.
<i>ΔComments:</i>			
6b. Accepting Direction and Criticism			
<input type="checkbox"/> Learning to accept direction.	<input type="checkbox"/> Accepts direction with positive attitude.	<input type="checkbox"/> Accepts constructive criticism with positive attitude.	<input type="checkbox"/> Accepts and applies constructive criticism to improve performance.
<i>ΔComments:</i>			
6c. Flexibility and Maintaining Self-Control			
<input type="checkbox"/> Learning to adapt to change. Resumes self-control with supervision.	<input type="checkbox"/> Adapts to change with positive attitude. Resumes self-control independently.	<input type="checkbox"/> Explores change. Maintains self-control in challenging circumstances.	<input type="checkbox"/> Initiates change. Maintains self-control in extremely difficult circumstances.
<i>ΔComments:</i>			
6d. Respecting Confidentiality			
<input type="checkbox"/> Maintains confidentiality with supervision.	<input type="checkbox"/> Understands why certain information must remain confidential.	<input type="checkbox"/> Maintains confidentiality independently.	<input type="checkbox"/> Models good discretion for others in maintaining confidentiality.
<i>ΔComments:</i>			
<i>Goals:</i>			

ASSESSMENT OF COMPETENCY **7** *Interacting With Others*

Student: _____ ID# _____
 Supervisor: _____
 Student's Job Title: _____
 First Review Date: _____

School: _____
 Company: _____
 Career Specialist/Teacher: _____
 Second Review Date: _____

In each row, please check ONE phrase that best describes the student's performance.

NEEDS DEVELOPMENT	COMPETENT	PROFICIENT	ADVANCED
7a. Interacting With Customers/Clients			
<input type="checkbox"/> Developing skills necessary to deal with difficult customers/clients and situations.	<input type="checkbox"/> Appropriately requests assistance when dealing with difficult customers/clients and situations.	<input type="checkbox"/> Resolves client/customer problems independently where appropriate.	<input type="checkbox"/> Proactively handles stress of difficult customers/clients and situations.
<i>ΔComments:</i>			
7b. Interacting With Co-Workers			
<input type="checkbox"/> Developing basic interaction skills. Responds when others initiate conversations.	<input type="checkbox"/> Initiates positive interactions with co-workers.	<input type="checkbox"/> Participates constructively as part of a team.	<input type="checkbox"/> Leads teams of co-workers to complete projects in an effective and timely manner.
<i>ΔComments:</i>			
7c. Managing Stress and Conflict			
<input type="checkbox"/> Identifies conflict and considers its source with supervision.	<input type="checkbox"/> Identifies conflict and considers is source independently.	<input type="checkbox"/> Recognizes and avoids potential conflict. Maintains perspective and a sense of humor.	<input type="checkbox"/> Resolves conflict by appropriately addressing issues with involved parties.
<i>ΔComments:</i>			
7d. Respecting Diversity			
<input type="checkbox"/> Developing an understanding of diversity.	<input type="checkbox"/> Understands diversities and similarities.	<input type="checkbox"/> Demonstrates ability to work with people different from him/herself.	<input type="checkbox"/> Seeks out opportunities to work with people different from him/herself.
<i>ΔComments:</i>			
Goals:			

ASSESSMENT OF COMPETENCY 8 Understanding All Aspects of the Industry

Student: _____ ID# _____
 Supervisor: _____
 Student's Job Title: _____
 First Review Date: _____

School: _____
 Company: _____
 Career Specialist/Teacher: _____
 Second Review Date: _____

In each row, please check ONE phrase that best describes the student's performance.

NEEDS DEVELOPMENT	COMPETENT	PROFICIENT	ADVANCED
8a. Understanding the Structure and Dynamics of the Entire Organization			
<input type="checkbox"/> Is aware of his/her own role within the department.	<input type="checkbox"/> Demonstrates working knowledge of the department's role in the organization and how it relates to other departments.	<input type="checkbox"/> Understands and negotiates the communication and workflow between departments.	<input type="checkbox"/> Understands the role of the organization in the industry and the economy.
<i>ΔComments:</i>			
8b. Recognizing Health and Safety Issues			
<input type="checkbox"/> Practices appropriate health and safety protocol at the workplace with assistance.	<input type="checkbox"/> Practices appropriate health and safety protocol independently and recognizes their importance.	<input type="checkbox"/> Understands the implications of health and safety principles and applies them to new situations.	<input type="checkbox"/> Models good health and safety practices and helps others to understand their importance.
<i>ΔComments:</i>			
8c. Understanding Personal Policy and the Labor/Management Relationship			
<input type="checkbox"/> Developing an understanding of personnel policy, and where appropriate, the role of labor organizations.	<input type="checkbox"/> Understands personnel policy, and however appropriate, the role of labor organizations.	<input type="checkbox"/> Adheres to personnel policy and understands its impact on individuals.	<input type="checkbox"/> Understands personnel policy and its impact on the organization; and contributes to a positive work culture.
<i>ΔComments:</i>			
<i>Goals:</i>			

Student: _____ ID# _____
 Supervisor: _____
 Student's Job Title: _____
 First Review Date: _____

School: _____
 Company: _____
 Career Specialist/Teacher: _____
 Second Review Date: _____

In each row, please check ONE phrase that best describes the student's performance.

NEEDS DEVELOPMENT	COMPETENT	PROFICIENT	ADVANCED
9a. Teaching and Learning on an Ongoing Basis			
<input type="checkbox"/> Developing an appreciation for learning new skills.	<input type="checkbox"/> Participates in professional development opportunities and shares learning upon request.	<input type="checkbox"/> Participates in professional development opportunities and shares learning independently.	<input type="checkbox"/> Uses and actively acquires new skills; initiates training of others.
<i>ΔComments:</i>			
9b. Balancing Personal, Professional and Academic Responsibilities			
<input type="checkbox"/> Learning to recognize the differences among personal, professional and academic life choices.	<input type="checkbox"/> Applies the ability to manage personal, professional and academic responsibilities	<input type="checkbox"/> Balances personal, professional and academic life choices.	<input type="checkbox"/> Prioritizes effectively among personal, professional and academic responsibilities
<i>ΔComments:</i>			
9c. Setting Career Goals			
<input type="checkbox"/> Needs to gain awareness of career opportunities.	<input type="checkbox"/> Aware of career opportunities.	<input type="checkbox"/> Actively researches career opportunities.	<input type="checkbox"/> Initiates steps to accomplish career goals, including participating in professional development activities such as workshops and seminars.
<i>ΔComments:</i>			

Goals: