

Jobs to Careers

*Promoting Work-Based Learning
for Quality Care.*

The *Jobs to Careers* Milestone Tool: Planning a Work-Based Learning Project By Rebecca Starr

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The Milestone Tool for planning a work-based learning project will help any partnership that is developing work-based learning delivery methods of instruction. Moreover, this tool also has broader applicability to projects that seek to design new and innovative ways to educate employees.

This tool was developed in the context of *Jobs to Careers: Promoting Work-Based Learning for Quality Care*, which seeks to advance and reward the skill and career development of low-wage incumbent workers providing care and services on the front lines of our health and health care systems. The project is a national initiative of the Robert Wood Johnson Foundation, in collaboration with the Hitachi Foundation and the U.S. Department of Labor. Jobs for the Future serves as the National Program Office for *Jobs to Careers*.

A key focus of the initiative is to test models of work-based learning at 17 grantee sites across the country. Each site has a unique way that it is delivering work-based learning, but across all the sites overarching principles guide their efforts.

Jobs for the Future developed this tool to help in a daunting task: planning and documenting the key activities and major milestones for each element of a work-based learning project. The tool breaks down program elements for the partners to fill in, along with accompanying timeframes for completion. This is a step-by-step process that will take the project through the planning and keep it on track throughout implementation, if used consistently as a project management tool.

To determine the efficacy of a project, planners must begin by deciding which data variables to measure. The partnership then needs to take that broad vision and develop a detailed plan for project implementation, complete with milestones and timelines for completion. The partners must try to predict where the barriers and challenges might occur so they can address them early in the process.

Careful planning is critical to the success of any project with many moving parts and possible barriers. Employers, educators, and other key partners collaborate to develop a vision for the project, along with a mapping out of outcome measurements of success.

The tool is a “living document,” intended to be revised on a regular basis. It includes key questions to provoke thinking about how to map out each program element.

Of course, this tool cannot include every possible issue, nor is it possible to predict all the possible circumstances or barriers that could occur within individual institutions. However, the guiding questions will start the planning team on items that arise when implementing a complex project.



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How To Use the Milestone Tool

Begin by completing the cover sheet, and then proceed to the eight worksheets that follow. Each worksheet represents one element of work-based learning or one aspect in the process of delivering career advancement opportunities through work-based learning:

- Partnerships
- Career Advancement and the Development of Career Ladders
- Cohort Selection
- Work-Based Learning
- Educational Organization Policies and Practices
- Employer Organization Policies and Practices
- Project Management Capacity
- Additional Items

Begin each worksheet by considering Part I: Questions to Consider with Your Planning Team and Part II: Brief Description. These questions are designed to help you and your planning team identify:

- Your goals for that element of delivering career advancement opportunities through work-based learning;
- Your present capacity for achieving those goals; and
- What tasks or policies you need to add or alter to ensure success.

Part I: Questions to Consider with Your Planning Team: Discuss these questions with your Planning Team. It is not necessary to answer them on the worksheet if you do that in your meeting minutes.

Part II: Brief Description: Write a brief description explaining both present and desired capacities with which you will achieve your goals.

We recommend that you complete the worksheets in order. For each worksheet, discuss Part I and Part II before proceeding to Part III: Action Steps and Outcomes. The answers in Part I and Part II will help you determine how

to complete Part III. Part III will ensure that all partners involved in delivering career advancement opportunities through work-based learning clearly understand what success means for each frontline worker and how each partner is expected to play a role in seeing that the goal is met.

Part III: Action Steps and Outcomes

- **Step One:** With your planning team, determine what steps are necessary to ensure that each relevant element (such as curricula, human capacity, policies) will be firmly in place to ensure that frontline workers have everything they need to advance their careers. Also note who is responsible for ensuring each step is completed and in what time frame.
- **Step Two:** Clearly state desired outcomes for each action step so the Planning Team understands how each outcome relates back to the desired goals and whether the action steps will result in what is necessary for project success.

Cover Sheet

Lead Organization

Lead Contact

Vision Narrative

What has your organization set as its overarching goal for this project?

At the end of the project, what systems changes will have been made at the employer organization? At the educational organization?

What will success look like?

PARTNERSHIPS

Part I: Questions to Consider with Your Planning Team

- Who are the partner organizations? Identify the roles and responsibilities of each. Perhaps prepare a Memo of Understanding that everyone signs. Who will be the chair?
- When will you meet (at the least every month)? Who will convene the meetings? Who will take minutes?
- Which other organizations must be on board in order to accomplish this vision?
- What are the roles for each partner?
- Who will be the lead person from each organization?
- How much time will each organization need to dedicate to this project?
- What contributions are expected from each partner?
- How will this partnership make decisions?
- How will you communicate between and among all the partners?
- Who will determine which employer sites are selected?

Part II: Brief Description

Briefly describe the partnerships that will plan and implement the project.

PARTNERSHIPS

Part III: Action Steps and Outcomes	
Action Steps	Outcomes
<p>Action Step 1</p> <p>Person Responsible: <input type="text"/> Completion Target Quarter (I, II, III, IV): <input type="text"/></p>	
<p>Action Step 2</p> <p>Person Responsible: <input type="text"/> Completion Target Quarter (I, II, III, IV): <input type="text"/></p>	
<p>Action Step 3</p> <p>Person Responsible: <input type="text"/> Completion Target Quarter (I, II, III, IV): <input type="text"/></p>	

COHORT SELECTION

Part I: Questions to Consider with Your Planning Team

- How will you recruit participants? What will your marketing campaign be within the employer organization? How will you generate interest among employees?
- Who will develop criteria for selecting participants? Who will make the final decision?
- Will you need to give any incentives to participate?
- How will you assess candidates' skills and educational levels? For example, will you use ACUPLACER (a computerized battery of tests that are used to assess preparedness for college-level work).
- What will you do if candidates need remediation? Will passing these remediation courses be a prerequisite to starting the training? Or, can you somehow incorporate remediation and pre-college skills training into the whole project?
- How will you acquire the information you need on each selected participant so you can measure progress as the project unfolds? Consider creating a database with these measures up front so you can evaluate success.
- When is a realistic start date for cohort training?

Part II: Brief Description

Briefly describe the type of employees you intend to target initially for training.

COHORT SELECTION

Part III: Action Steps and Outcomes

Action Steps

Outcomes

Action Step 1

Person Responsible:

Completion Target Quarter (I, II, III, IV):

Action Step 2

Person Responsible:

Completion Target Quarter (I, II, III, IV):

Action Step 3

Person Responsible:

Completion Target Quarter (I, II, III, IV):

CAREER ADVANCEMENT AND THE DEVELOPMENT OF CAREER LADDERS

Part I: Questions to Consider with Your Planning Team

- What occupational goal are your frontline employees working towards?
- Which of the rungs on this ladder will result in eligibility for an academic credential or taking a certification exam?
- What is the business case for this? How will labor supply and demand affect recruitment and retention for these positions? How will these positions change over time (if at all)? Is your ladder aligned with the employers' greatest business needs?
- What strategies must be in place to ensure that the rungs on the ladder are achievable for adults working full time?
- What about strategies for adults without pre-college skills?
- What competencies are required for the targeted occupation?
- How will participants receive career coaching?

Part II: Brief Description

Briefly describe the career ladders you intend to develop.
Example: Frontline worker → CNA → LPN → RN

CAREER ADVANCEMENT AND THE DEVELOPMENT OF CAREER LADDERS

Part III: Action Steps and Outcomes

Action Steps

Outcomes

Action Step 1

Person Responsible:

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Action Step 3

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WORK-BASED LEARNING

Part I: Questions to Consider with Your Planning Team

- What specific competencies are needed for the occupation you are training individuals for?
- How will you teach each competency (e.g., traditional classrooms, on-line learning, work-based learning)?
- If by work-based learning, what specific tasks can be used to teach these competencies?
- Who will assess the employees' attainment of these competencies?
- How often will the employer and educational partner meet to design curriculum delivery methods?
- What does the college need to do to ensure that credit can be awarded for the work-based learning component of the curriculum?
- What does the college need to do to award credit to employees for their prior learning?
- Who will teach the various components of the curriculum? Can employer supervisors ("faculty extenders") be engaged in any of this teaching?
- What credentials do "faculty extenders" need so that training they offer will qualify for credit? What training will they require? Who will train them?
- Is the learning that will take place relevant to the job that the employee is currently performing? How can this be best applied within that work environment?
- What part of the curriculum is most relevant to the department? Supervisors?
- How can work-based learning be designed to make the supervisor's job easier? To make the department run better?
- How will you create group-learning teams so the members of the cohort can support one another as a "learning community"?
- What is the plan to account for workday disruptions?

Part II: Brief Description

Briefly describe the various curriculum delivery methods you plan to utilize.

WORK-BASED LEARNING

Part III: Action Steps and Outcomes

Action Steps

Outcomes

Action Step 1

Person Responsible:

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EDUCATIONAL ORGANIZATION POLICIES AND PRACTICES

Part I: Questions to Consider with Your Planning Team

- Who will do the teaching?
- Who will train the supervisor(s) at the employer sites?
- How will employee participants be integrated into the college? Issues to consider include: registration for student ID cards; computer access; emails; campus tours; and on-campus resources like learning centers, writing centers, career counseling.
- What process will be used to determine if college credit will be awarded for work-based learning? Start finding that out early. Speak to key people and invite them to join your advisory group.
- What internal stakeholders need to support this effort? What is the plan to gain their buy-in?
- Will you need regulatory or accrediting approval for this plan? If yes, what is the short-term plan to move forward without it? What is the long-term plan to gain it?
- How will work-based learning improve the quality of your training program? How will that improved quality be assessed?
- Who will be charged with trying to infuse the learning into the workplace?
- Will the classroom be used for traditional didactic instruction?
- Will the workplace be used as the site to apply that newfound knowledge?
- Is work-based learning being designed so that you can market it to other employers or replicate it in other industries?

Part II: Brief Description

Briefly describe the type of employees you intend to target initially for training.

EDUCATIONAL ORGANIZATION POLICIES AND PRACTICES

Part III: Action Steps and Outcomes

Action Steps

Outcomes

Action Step 1

Person Responsible:

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EMPLOYER ORGANIZATION POLICIES AND PRACTICES

Part I: Questions to Consider with Your Planning Team

- How and when will you bring employees on board? What kind of training and orientation will you give them?
- Might employees benefit from an “Intro to Health Care” course?
- Will you grant release time for employees’ learning outside of the job? Will you offer incentives to them for participating, such as bonuses or interim rewards before a credential is attained?
- What will the new pay scales be? Will participants get promoted? Will they get a pay raise at each step in the training process? How much?
- How will you market this program to employees?
- What kinds of supports (e.g. tutors, coaches, mentors) will you put into place to make sure that frontline employees succeed, given the fact that many of them have not excelled at school in the past and might be fearful and not adept at sitting in class, taking exams, etc.
- Will you offer career counseling for the participants? Are there case management supports for them to help them cope with life and family issues that may arise?
- What HR policies must be created, adjusted, or eliminated to support the career ladder (e.g., rewards, tuition reimbursement, release time, supervisor training, performance evaluations)?
- What other systems need to be developed to support the career advancement of employees?
- What internal stakeholders need to support this effort? What is the plan to gain their buy-in?
- How will you train supervisors and motivate them to support and engage in the advancement of employees who report to them?
- Have you developed a system to assess results? Job satisfaction? Retention? Performance? Productivity?
- What is the plan to create advancement opportunities that will be available to the entire organization? How will they be marketed and publicized?

Part II: Brief Description

Briefly describe the policies and practices that will need to change within employer organizations to implement the project and institutionalize expanded career advancement opportunities for all employees.

EMPLOYER ORGANIZATION POLICIES AND PRACTICES

Part III: Action Steps and Outcomes

Action Steps

Outcomes

Action Step 1

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PROJECT MANAGEMENT CAPACITY

Part I: Questions to Consider with Your Planning Team

- How will you document the system changes you will make to get this project off the ground? How will you document the stories of both failures and successes?
- Does the team have the skills necessary to manage this project? If not, how will you get the right people participating?
- Have enough staff been committed to managing this?
- Does the designated manager have a commitment from the organization's executives? From the board?
- Has an advisory group been created? If so, does it include all stakeholders who need to be in the room and need to buy in?
- How often will this group meet?
- Who will convene this group and take minutes?
- Who will ensure that suggestions and policies decided upon by this group are implemented?

Part II: Brief Description

Briefly describe the members of your team who will be responsible for managing project implementation and how much FTE time will be expected and paid for.

PROJECT MANAGEMENT CAPACITY

Part III: Action Steps and Outcomes

Action Steps

Outcomes

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ADDITIONAL ITEMS

Part I: Questions to Consider with Your Planning Team

- What approvals will be needed at each stage? Begin to reach out early to start the process. Examples include: getting credit for work-based learning; getting credit for prior learning; HR approval of job titles; promotions; salary raises; regulatory agency approval of state-level policies?
- What changes can/should be made at each step of the way?
- How will you continually market your program so it's visible all the time, not just when you go to ask for more funding?
- Will you seek additional funding to sustain the effort? From whom? Employers? Education partners? State or county government?
- How will you involve the local workforce community (i.e. Workforce Investment Boards) at the beginning of the project, to get input and resources and in case you want to apply to its members for funding?
- How will you scale this effort up so it can affect many more employees?

Part II: Brief Description

Briefly describe additional items you plan to address.

ADDITIONAL ITEMS

Part III: Action Steps and Outcomes

Action Steps

Outcomes

Action Step 1

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About *Jobs to Careers*

Jobs to Careers supports partnerships to advance and reward the skill and career development of incumbent workers providing care and services on the front lines of our health and health care systems. The initiative is a national program of the Robert Wood Johnson Foundation, in collaboration with the Hitachi Foundation and with additional support from the U.S. Department of Labor, Employment and Training Administration. *Jobs to Careers* supports partnerships of employers, educational institutions, and other organizations to expand and redesign systems to:

- Create lasting improvements in the way institutions train and advance their frontline workers; and
- Test new models of education and training that incorporate work-based learning. The core concept of *Jobs to Careers* is “work-based learning,” which represents a novel approach to meeting labor force needs in health care as well as in other fields.

Key Components of *Jobs to Careers*

- Work-based learning is a key component of an overall skill building strategy that may also include an array of other learning approaches, such as more traditional off-site, on-site, technology-enabled, or experience-based learning.
- Career paths are developed and are readily available to frontline workers.
- Both the employer and education partners develop and implement changes that recognize the needs of working adults and that improve access to and success in skill building efforts by frontline workers.
- Frontline workers are recognized and rewarded as they build skills and expand knowledge necessary for their current job responsibilities or for advancing to new positions.

Essential Elements of Work-Based Learning in *Jobs to Careers*

Work-based learning is focused on building the essential skills and knowledge to effectively conduct current job responsibilities of the frontline worker and/or to advance in job responsibilities and career steps.

- The program is learner-centered. Learning is co-created by the individual learner and the person responsible for facilitating that learning.
- Development of the curriculum is shared between the educational institution and the employer.
- The facilitation of the learning is shared between the educational institution and the employer.
- The learning process is embedded in the work process.

Core Components of the *Jobs to Careers* Work-Based Learning Model

- The curriculum is embedded in the work process.
- Learning is embedded in the work process.
- Co-workers and supervisors are active participants in the process.
- Assessment is embedded in the work process.
- There is a strong potential for recognition and rewards as frontline workers build skills and expand knowledge necessary for their current job responsibilities or for advancing to new positions.
- Rewards (raises, promotions, credentials) are given for engaging in the program.
- Educational partners make organizational changes to support work-based learning.
- Employers make organizational changes to support work-based learning.
- Organizational leaders are engaged in the project and motivated to sustain the effort.