

High Performing Program Self-Assessment





High Performing Program Rubric and Self Assessment

The following is a short questionnaire to evaluate your training program for investment, partnership decisions and improvement opportunities. Check the box that best describes how well your program meets the standards described below. Once you have made your selection, you will be provided with suggested actions and resources to help you address the gaps.

1 - Strategy: A strategy is in place to address program challenges and opportunities.

Low Performing Program	Performing Program	High Performing Program
a. Program is not responsive to market need.	a. Program supports and reflects local market and demographics.	a. Program incorporates adaptive strategies to continuously evaluate strategic plans in light of market, demographics, technology shifts and the regulatory environment.
b. Strategic planning is not evidenced or is short term at best.	b. Strategic planning is used by program administration for decision making and resource allocation	b. Shared leadership utilizes strategic planning to add or terminate services/programs, redirect resources; modify instructional design; adapt to changing standards/regulations; use technology; change testing or standards; serve new, changing or special student populations; partnerships and alliances and faculty and staff relationships.
c. Minimum strategies to reduce risks to students are identified.	c. Strategies to reduce risks to the student and educational institution are in place. Safety is part of the curriculum.	c. Strategies to reduce risks for the student, educational institution and the employer are in place and a safety record demonstrates the effectiveness of exemplary safety precautions.

_____ **Minimal**

_____ **Some features**

_____ **Robust Plan**

Based on your answer you should focus on the following:

Minimal – Take these steps to develop a more comprehensive plan	Some features – Identify your gaps:	Robust plan – Congratulations
1 - Identify the stakeholders who need to be involved in the strategy development – company management, technical trainers, field managers, educators, workforce development – and set up a meeting with sufficient time to discuss the program strategies and goals.	<p>1 - Does the strategy have both short and long term goals?</p> <p>If not, set up a meeting with program stakeholders to discuss the program’s objectives and goals and then establish a strategy to achieve them.</p>	Your plan has characteristics of a high performing program. Continue to review your strategy to ensure that it is updated to reflect changes in instructional design, changes in regulations/standards and changes in the student population, to redirect resources to address those changes and to maintain existing and new partnerships to sustain the program.
2 - Collect any data that is available on the program that can be used to assess current performance.	<p>2 - Are all stakeholders involved in reviewing the program for improvement opportunities?</p> <p>If not, identify all of the stakeholders (educators, field managers, technical trainers, company management and workforce planning) and establish an industry-educational council to review program components, goals and performance and to make recommendations for change.</p>	
3 - Clearly identify short and long term goals – what are you trying to accomplish with your program? How effective is the current program? How will you address student issues? What expectations does your management have?	<p>3 - Are changes in technology, regulations/standards and changing student populations easily adopted into the program?</p> <p>If not, identify the roadblocks to making changes to the programs and develop an action plan to address the issues.</p>	
4 - Involve all stakeholders of the program to assess the current program and to identify what changes should be made - new modules to be added, new technology to be used to meet students needs for distance learning and hands on training,	<p>4 - Does the strategy ensure the safety of the students?</p> <p>If not, identify and implement initiatives/additional training to reduce the risks for the students,</p>	

resources required and where can they be obtained; how to ensure the safety of the students	educational institutions and the employer. Ensure that safety precautions are in place, that students have been trained in the appropriate safety procedures and that the safety record for the students demonstrates the effectiveness of the training.	
Resources available: Sample Strategic Plan, Sample meeting agenda	Resources available: Sample meeting agenda Sample Strategic Plan Sample charter for Industry-education council Sample roadblocks Sample student safety record report	

2 - Structure: The program structure incorporates methodology to determine the requirements, needs, expectations and preferences of the industry.

Low Performing Program	Performing Program	High Performing Program
a. Students are recruited into programs based on space and availability.	a. Students are recruited and provide input via customer satisfaction surveys at the end of training.	a. Students are actively engaged in current and future education offerings and improvements via a variety of feedback systems.
b. Stakeholders are not part of program development and improvement.	b. Stakeholders are part of program development, improvement and planning.	b. Stakeholders are actively engaged in program planning, delivery and evaluation.
c. Students and stakeholders meet separately or not at all.	c. An advisory committee is in place to respond to market need.	c. Students and stakeholders collectively incorporate new ideas, technology, processes and services to create a mutual climate of success for industry and education.
d. Feedback mechanisms are not in place	d. Customers are routinely surveyed regarding satisfaction with the program and outcomes.	d. Customer satisfaction is in place with mutually designed strategies to continuously improve.
e. Program offers classroom and lab-based instruction.	e. Program is structured to offer course content through distance education, on-site and work-based delivery.	e. Program structure meets the needs of employers in terms of timing, training offerings/content and quality plus it meets student needs in terms of distance, classroom and work based settings.

_____ **Minimal**

_____ **Some features**

_____ **Methodology developed**

Based on your answer you should focus on the following:

Minimal – Take these steps to improve your methodology:	Some features – Identify your gaps:	Methodology developed – Congratulations
1 - Develop a process to recruit and screen students based on the skill requirements of program.	<p>1 - Does the program have a process in place to change or add new modules or services?</p> <p>If not, develop and implement a process that uses input from all stakeholders and performance reports to identify where existing modules need to be updated (technology improvements) or added (new skills/tasks required).</p>	Your plan has characteristics of a high performing program. You should continue to review the methodology to ensure that the right students are being recruited for the program; that all stakeholders are involved in program planning, delivery and evaluation; that new ideas and technology are quickly incorporated and that customer satisfaction is measured and acted upon.
2 - Develop a process to allow students and managers to provide feedback on the program.	<p>2 - Are all stakeholders involved in reviewing the program for improvement opportunities?</p> <p>If not, include all stakeholders, including students, to review performance reports and feedback information to identify improvement opportunities.</p>	
3 - Review the curriculum to identify potential upgrades to training offerings and methods of delivery	<p>3 - Are changes in technology, regulations/standards and changing student populations easily adopted into the program?</p> <p>If not, identify the root cause or roadblocks to making changes to the program and develop an action plan to address the issues.</p>	
	<p>4 - Does the program have a process to actively recruit and screen the appropriate students?</p> <p>If not, involve the educators in the development of a process that assesses and screens potential students; focus recruitment on the students that participate in Tech Prep or Vocational programs;</p>	

	include parents in the recruitment process.	
	<p>5 - Does the program have a process to measure the satisfaction with the program from all stakeholders?</p> <p>If not, develop a simple feedback tool that assesses the satisfaction of the students, the field managers/supervisors, senior leaders and educators with the program. Use the information as part of the review for improvement opportunities.</p>	
<p>Sample recruiting/screening process.</p> <p>Sample feedback process.</p>	<p>Sample recruiting/screening process.</p> <p>Sample feedback process.</p> <p>Sample roadblocks to change</p>	

3 - Leadership: Highly qualified leadership is in place to guide and sustain the program.

Low Performing Program	Performing Program	High Performing Program
a. Program goals are weak and do not reflect the intent of the program.	a. Stated goals are clear and appropriate.	a. Program goals are clear, challenging and appropriate.
b. Program has ill defined or conflicting leadership.	b. Educational leadership is involved and supportive of the program.	b. Combined industry-education leadership guides, directs and supports the program.
c. Program lacks innovation and credibility.	c. Program includes innovation to accomplish goals.	c. Program includes technological and organizational innovation to sustain and succeed.

_____ **Minimal**

_____ **Some features**

_____ **Strong leadership involved**

Based on your answer you should focus on the following:

Minimal – Work on the following:	Some features – Identify your gaps:	Strong leadership involved – Congratulations
<p>1 - Develop a clear business case for the program and present to field and staff management so they can understand the benefits of the program to their organizations.</p>	<p>1 - Do all stakeholders clearly understand the program goals and objectives and their role in accomplishing them?</p> <p>If not, as part of the strategic plan, develop a clear definition of the program goals and objectives and assign responsibility for their accomplishment as part of the strategic plan. Review the goals and progress toward their achievement at the joint industry-education council meetings.</p>	<p>Your program has the appropriate level of leadership, both at the industry and educational level, to oversee the program, take or assign accountability for goal achievement, identify technological and organizational innovation to sustain the program and authorize resources to maintain program goals.</p>
<p>2 - Ensure that the educational partners have clear ownership and accountability for the program. Include responsibilities in the strategic plan and the industry-education charter.</p>	<p>2 - Is the industry management on board with the program and supportive of its goals?</p> <p>If not, prepare a business case for management identifying the benefits of the program, progress made to date, potential areas for improvement and their role in supporting the program.</p>	
<p>3 - Establish a joint industry-education leadership council to guide, direct and support the program.</p>	<p>3 - Have the educational institutions made a commitment to the success of the program?</p> <p>If not, identify why not – are the right people involved from the schools? Can they make changes in the school curriculum? Do they have the “political clout” needed to keep the program working? Do they understand the employer’s commitment to the program and the students? Work with the school department heads/deans to address the issues. Involve senior management from the employer to stress the importance and</p>	

	value of the program to the school.	
4 – Ensure that resources and funding for the program are identified, approved and budgeted.	<p>4 - Are industry and educational leaders involved in the oversight of the program strategy?</p> <p>If not, establish a joint industry-educational council made up of program administrators, field managers/supervisors, educators, students and community affairs personnel who are responsible for the oversight of the program, including a review of goals, assignment of resources, program performance review and improvement opportunity identification.</p>	
Resources available: Sample Business Case Sample charter for education/industry council Sample strategic plan	Resources available: Sample business case Sample strategic plan Sample charter for education/industry council	

4 - Administration: Administration provides support, guidance, direction and resources for optimal operation and employer satisfaction.

Low Performing Program	Performing Program	High Performing Program
a. Budget information is unavailable.	a. A program specific budget is in place to cover operating expenses and basic equipment for the program.	a. A process for budgeting and financial management is in place to support program sustainability and long range goals.
b. Program design and delivery are outdated.	b. Program design and delivery are sufficient for current industry need.	b. Program cycle time is low, productivity is high, cost control is efficient to meet program design requirements. Delivery maximizes student and industry investment of time and resources.
c. Administrators do not track program specific data.	c. Administrators track yearly progress of program performance in terms of student placement.	c. Administration continuously monitors program performance, student satisfaction and placement and employer satisfaction.
d. Administrators respond to employer inquiries regarding programs and students.	d. Administrators have active advisory committees of employers.	d. Administrators routinely make on-site visits to employers and engage employers in education committees and work-based projects.

_____ **Minimal**

_____ **Some features**

_____ **Administrative support OK**

Based on your answer you should focus on the following:

Minimal – Work on the following:	Some features – Identify your gaps:	Administrative support and processes in place – Congratulations
1 - Work with the budgeting group in your organization to understand the components of a budget. Identify such items as salary for students doing summer internships, salary for adjunct instructors, salary for program administrators, cost of materials including fire retardant clothing, hard hats, safety glasses, recruitment materials including posters, newspaper ads, etc. Develop a budget to support program sustainability and long range goals and a process to monitor actual spending	<p>1 - Is there a process in place to create and monitor a budget for the program?</p> <p>If not, work with the budgeting group in your organization to develop a budget for the program, clearly identifying all resources, including salaries for summer internships, cost of materials, recruitment material needed to maintain the program and a process to monitor actual spending.</p>	Your program has the administrative processes and personnel in place to continuously monitor the performance of the program, student satisfaction and performance and employer satisfaction and to ensure that resources are available to sustain the program and to meet the program's long term goals.
2 – Work with the educational partners to develop a process to schedule and track implementation of new program modules to ensure quick response to program changes.	<p>2 - Are there resources assigned to monitor program performance, student satisfaction and placement and employer satisfaction?</p> <p>If not, assign resources to the development of a simple satisfaction survey and the development of a performance tracking process. This resource should make regular reports to the industry-education council on program performance.</p>	
3 - Assign resources to continuously monitor program performance, student satisfaction and placement and employer satisfaction and report on a regular basis to the industry-education council.	<p>3 - Does the educational institution make on-site visits to evaluate student performance and to engage employers in education committees and work-based projects?</p> <p>If not, discuss this at the industry-education council meetings; develop an action plan with clearly defined responsibilities.</p>	
4 - Engage employers in education advisory		

committees and work-based programs		
Resources available: Sample budget components Sample feedback survey	Resources available: Sample budget components Sample feedback survey	

5 - Staff: Faculty and staff are motivated to develop and utilize their full potential to align program goals to those of the overall industry.

Low Performing Program	Performing Program	High Performing Program
a. Faculty and staff experience and knowledge are not current with industry practice.	a. Faculty and staff have the credentials to teach in specific industry areas.	a. Faculty and staff have active industry compatible credentials, recent and on-going industry experience and regularly and actively participate in industry related trade and professional associations.
b. Faculty and staff utilize outdated methodologies and strategies.	b. Faculty and staff incorporate in class/laboratory problem solving curriculum aligned to industry needs.	b. Faculty and staff utilize work-based and classroom based methodologies that enable students to achieve success in mastering content, competencies and credentials.
c. Faculty and staff have limited knowledge and experience in educational methodology.	c. Faculty and staff have appropriate educational teaching credentials and participate in professional educator development.	c. Faculty and staff are considered highly qualified teachers by the educational system and employer community and can easily adapt the curriculum to student learning style.

_____ **Minimal**

_____ **Some features**

_____ **Motivated faculty**

Based on your answer you should focus on the following:

Minimal – Work on the following:	Some features – Identify your gaps:	Motivated – Congratulations
1 - Identify appropriate industry credentials and industry experiences for faculty and staff and require completion.	<p>1 - Does the program faculty have industry credentials?</p> <p>If not, work with the school to identify what credentials are required and where they can be obtained. Include the cost of training or certification in the budget.</p>	Your program has the faculty and staff who are recognized by the educational system and the employer community; who are able to incorporate both work-based and classroom based training into their curriculum and who are able to change the curriculum to meet students' needs; and who keep current on industry trends and issues through participation in industry-related trade and professional organizations.
2 - Assess classroom methodology alignment with industry needs and develop actions for improvement.	<p>2 - Does the faculty participate in industry related trade and professional associations?</p> <p>If not, use the regularly scheduled education/industry council meetings to keep the faculty aware of trade meetings/conferences so they can keep current in the business. Discuss joint funding of these efforts.</p>	
3 - Ensure that the faculty and staff have appropriate education teaching credentials and participate in professional educator development.	<p>3 - Does the faculty use both work-based and classroom based methodologies?</p> <p>If not, use information gathered from the students and employers to assess the need for work-based training and implement where appropriate.</p>	
4 - Ensure that the faculty and staff have the support of the school for the program.	<p>5 - Does the faculty easily modify the curriculum and training delivery to meet student learning styles?</p> <p>If not, meet with the school department heads and faculty to review information gathered from the students on the need to offer different</p>	

	learning opportunities.	
	Resources available: Sample feedback survey Sample education/industry council meeting agenda	

6 - Students: Students, stakeholders and organizational value is generated through key processes to insure student success.

Low Performing Program	Performing Program	High Performing Program
a. Student support services are limited.	a. General student services are provided (financial aid, guidance and counseling, job placement).	a. Individual students are interviewed, assessed and mentored to insure appropriate supports and services for educational and workplace success.
b. Student demographics are not representative of those of the local community nor of the industry.	b. Student demographics represent those of the community and the industry.	b. Student demographics are representative of the community at large and include non-traditional and minority participation, completion and job placement.
c. Student follow-up is completed at a given interval after completion of the program.	c. Student follow-up is completed at a given interval after completion of the program and throughout the first few months of employment.	c. Student follow-up is completed at a given interval after completion of the program and throughout the first year of employment with a guarantee to the employer and individual that if the individual is not trained to industry standards, s/he can return to the educational setting for follow-up training.
d. Some safety hazards noted in the classroom and curriculum content.	d. Curriculum content incorporates safety training and a hazard free environment is maintained.	d. Students have low incidences of safety violations and are able to identify and comply with industry safety regulations.
e. Employability and mastery of basic skills are not part of the program content.	e. Employability skills are generally taught during the course of the program.	e. Employability and basic skills are incorporated and mastered through program content and practice.

_____ **Minimal**

_____ **Some features**

_____ **Student support in place**

Based on your answer you should focus on the following:

Minimal – Work on the following:	Some features – Identify your gaps:	Student support services are in place – Congratulations
1 - Assess current student services and present a plan for improvement to industry council.	<p>1 - Is there a process in place to assess students prior to acceptance into the program?</p> <p>If not, develop a process in conjunction with the vocational schools and post-secondary schools to assess students against the skill and knowledge requirements of the available positions.</p>	Your program has the processes and personnel in place to support the students, including assessment and mentoring, follow up after program completion, provision of employability skills and recruitment of candidates from non-traditional and minority populations
2 - Develop a recruitment plan to ensure that student demographics are representative of the community at large.	<p>2 - Is there a mentoring program in place for students throughout the program?</p> <p>If not, work with the field managers/supervisors, union leaders and educators to develop a program that provides coaching and mentoring to the students. Assign a “buddy” to the student from the work place who will provide support, answer questions and keep an eye on the student.</p>	
3 - Develop a process to follow up with students after completion of the program and throughout the first year of employment.	<p>3 - Does the recruitment process reach non-traditional and minority populations?</p> <p>If not, work with the educators and the community affairs groups to identify sources of non-traditional and minority populations. Develop a recruitment plan that focuses on those populations, including reaching out to parents for high school students, one-stop career centers and vocational schools for second career candidates and military websites for individuals coming off tour.</p>	
4 - Perform a safety audit to ensure that the program includes industry safety regulations	4 - Is there a process in place to follow up with the students after completion of the program and	

and develop a program to educate students on the requirements and to keep them free from harm.	during their first year of employment? If not, include this into the mentoring/coaching program. Have the students “buddy” continue to maintain contact with the student, even if employed somewhere else.	
5 - Incorporate employability and basic skills into the program.	5 - Is there a process in place to monitor student safety and to ensure students have low incidences of safety violations and are able to identify and comply with industry safety regulations? If not, develop a process that clearly identifies safety requirements and develop safety monitoring reports for presentation to the Education/Industry Council.	
	6 - Are employability and basic skills included in the curriculum? If not, build this in or offer as a separate event. Many high school students are unaware of the skills required for the workplace – coming to work on time, coming to work every day, wearing appropriate clothing, respecting and listening to the supervisor and other co-workers, etc.	
	Resources available: Sample student safety record report Sample employability skills Sample recruitment/assessment process	

7 - Community: Value-added services are provided to the employer community.

Low Performing Program	Performing Program	High Performing Program
a. Marketing strategies are developed and provided to students.	a. Marketing strategies are provided to students and employers.	a. A variety of informational and promotional strategies are in place to provide accountability to employers and the general public.
b. The employer community is generally supportive of the program.	b. Employers support the program by participating on committees and contributing materials for classroom training.	b. The employer community is supportive of the program, contributes materials and resources and equipment and participates in the teaching-learning process with faculty and staff.
c. Program benefits to employers are not documented.	c. The program benefits local employers by providing entry-level employees.	c. The program provides on-going, recognized benefits to the local and regional employer community as employers send students to the training for advanced knowledge and skills.

_____ **Minimal**

_____ **Some features**

_____ **Community supports**

Based on your answer you should focus on the following:

Minimal – Work on the following:	Some features – Identify your gaps:	Community organizations are involved in the program and supportive of the efforts - Congratulations
1 - Document program benefits to employers.	<p>1 - Is there a marketing plan in place that provides informational and promotional material to students, school officials and parents about the program and potential careers in the energy industry?</p> <p>If not, develop a plan that reaches out to students, parents, career centers, vocational schools and the military to increase their awareness of the types of jobs available in the industry, the skills needed to perform those jobs and the potential pay/benefits available.</p>	Your program has tapped into a valuable resource which can help identify, support and fund training programs in the high schools and at Career One Stop centers, identify recruitment techniques to interest students in the industry and to provide good publicity for the program.
2 – Develop a marketing strategy to provide informational and promotional material about the program, its benefits to the community and career opportunities for distribution to students, school officials, parents, one-stop career centers and the military.	<p>2 - Are community leaders part of the leadership council to provide program oversight?</p> <p>If not, invite community leaders to participate on the industry-education council. Reach out to workforce investment boards, chambers of commerce, urban leagues, etc. for representation. Leverage your community relations and governmental affairs organizations to identify the appropriate organizations and leaders.</p>	
3 – Assess current membership on the industry-educational council and improve participation by community leaders, employers, community relations / governmental affairs organizations.	<p>3 - Is the community relations/governmental affairs organizations involved in recruiting, working with the community leaders and helping to garner Foundation funds for the program?</p> <p>If not, invite them to participate. These organizations have contacts throughout the community to help in recruitment and sponsorship. They also have influence over the allocation of</p>	

	resources from company Foundations.	
4 - Develop a process for tracking students who are employed in the industry after completing the program		
Resources available: Sample business case GIE Branding material	Resources available: GIE Branding material	

8 - Evaluation: Program improvement and performance are measured by results.

Low Performing Program	Performing Program	High Performing Program
a. Program performance is below anticipated results.	a. Program performance meets expected results.	a. Program performance and outcomes are measured and benchmarked against competitor and comparable to other organizations providing comparable programs.
b. Levels of performance are identified yet do not perform according to targeted standards.	b. Key levels of performance are identified and meet standards.	b. Key levels of performance have been mutually identified, measured, reported and analyzed by stakeholders, students and organizational leadership.
c. Program results indicate in efficiencies in terms of business results.	c. Program results are adequate to meet business results.	c. Overall program results exceed accountability in efficiency and effectiveness in terms of stakeholder expectations and are aligned with industry results. A plan to continuously improve results is in place and is monitored.
d. Supportive or results oriented data are not available or are weak.	d. Data and information supports educational or workforce goals.	d. Data and information are available to support high performance achievement of both education and workforce goals and analysis is linked to student and program improvement.
e. Program is limited in organizational performance measures.	e. Program performance is reviewed in terms of benchmarking against comparable programs.	e. Analysis of data demonstrates a return of investment (ROI) for the student, the educational entity and the industry.
f. Program data and staff knowledge are not widely available for decision making or planning.	f. Program data and organizational knowledge are available to students, staff, stakeholders for decision making, planning and transitioning.	f. Program data, information and organizational knowledge are accurate, reliable, timely, secure and confidential and are used as the basis for program review.

_____ **Minimal**

_____ **Some features**

_____ **Measurement in place**

Based on your answer you should focus on the following:

Minimal – Work on the following:	Some features – Identify your gaps:	A comprehensive measurement system is in place - Congratulations
1 – Document the key performance indicators and expectations for results.	<p>1 - Is there a system in place that allows for the identification of key measures of performance?</p> <p>If not, set up time with the industry-education council to identify the key measures of performance – what is important to them and what measures trigger an action for improvement (example, measure recruitment activity – how many potential candidates are touched, from where; what is the diversity representation. Set goals for each of the measures.</p>	Your program has built in a continuous evaluation and improvement process which identifies key measures of performance, tracks that performance, reports on a regular basis to the industry-educational council and identifies areas of improvement, which are then reviewed, budgeted for and incorporated into the program
2 - Identify stakeholder expectations and expected business results.	<p>2 - Does the system track performance against those measures, report on the performance to the educational-industry council and identify areas for improvement?</p> <p>If not, develop a system and assign resources to the tracking of the key performance measures. Prepare reports for the council and identify areas where performance is not meeting the goals.</p>	
3 - Develop a system that measures and reports on the performance on a regular basis to all stakeholders and identifies opportunities for improvement.	<p>3 - Is there a process to measure and benchmark program performance and outcomes against other comparable programs?</p> <p>If not, identify other programs that are similar in nature and compare your program's performance against them. Identify areas where performance</p>	

	is below the comparison and investigate the best practices of the other programs for inclusion into yours.	
4 - Provide program data to students, staff, and stakeholders for decision making and planning.	<p>4 - Is the data used to demonstrate a return on investment for the program to senior leaders of the educational institutions and employers?</p> <p>If not, build this into the business case and regular reporting to the industry-education council and senior management</p>	
Resources available: Sample performance measures	Resources available: Sample performance measures Sample business case	

Strategic Plan Guidelines

- Program Description: Provide an overview of the program
 - What are the objectives of the program?
 - What is the scope?
 - What are the expected outcomes?
- Program Structure: Provide a description of the individuals involved in the program and their role.
 - Leadership Review Council
 - Educators
 - Program administrators
 - Field managers
 - Union leaders
 - Budgeting analysts for funding
- Future State: Describe what you would like the program to be in the future
 - What are the new expectations for the program
 - What are the short term goals – quick hits – that will help move the program toward meeting those expectations
 - What are the longer term goals required to sustain the program
 - What actions are needed to put the program back on track to meeting the goals including detailed steps, timeframes and person(s) responsible
- Measurement:
 - Identify the performance measures that will be used to monitor program progress
 - Identify how the data will be collected
 - Identify who will be responsible for collecting the data and reporting on progress.
- Follow-up:
 - Put in place a structure for regularly scheduled follow up meetings for the Leadership Council to review progress against goals
 - Hear feedback on student and employer satisfaction
 - Reallocate resources as appropriate
 - Celebrate successes

Sample Selection/Recruitment Process Skilled Trades Positions

1. Selection Sources
 - a. Focus on students that like to work with their hands
 - i. Career and technical education programs
 - ii. Vocational schools
 - iii. Construction career academies
 - b. Other options
 - i. Jobs for America's Graduates – students "at risk"
 - ii. Job Corp
 - iii. Military
2. Selection Criteria
 - a. High math scores – students are more apt to pass the pre-employment tests
 - b. Physical abilities testing
 - c. College pre-placement testing done in junior year to schedule remedial work
3. Recruitment Activities
 - a. High schools/vocational schools
 - i. Letters home to parents about career awareness and program evening sessions
 - ii. Program awareness sessions in the evening
 - iii. Career days
 - iv. Classroom presentations – specialized classes (electronics, welding, etc.)
 - v. Presentations at PTA meetings
 - vi. Utility facility tours
 - vii. Job shadowing/summer internships
 - b. College
 - i. Program awareness meeting with advisors
 - ii. School website
 - iii. Job/career fairs
 - iv. College TV and radio
 - c. Other
 - i. Utility website
 - ii. Local newspaper ads
 - iii. Posters placed in schools, churches, community centers
 - iv. Get Into Energy website

Sample Charter for Industry/Education Council

1. Identification of the parties involved and their agreement to cooperate
 - a. Community colleges to develop and implement a course of study toward an associate degree program in ...
 - b. Development of a consortium of the community colleges to manage the course of study
 - c. Utility to cooperate and collaborate with consortium for the implementation of the course of study
2. Agreement components:
 - a. Identify the participants and their role
 - i. Community college consortium to design, develop and implement the program
 - ii. Community college consortium to create an executive council for program oversight
 - iii. Utility to provide expertise on skill requirements, course content and operations and to provide instructors for technical courses
 - b. Identify the number of students allowed per school per semester
 - c. Identify the number of credits to be offered by:
 - i. Community colleges
 - ii. Utility
 - d. Identify the registration process (particularly if more than one school is participating)
 - e. Identify the payment structure and billing process for utility taught courses
 - f. Identify the requirements for program cancellation (minimum number of students, utility instructor availability)
 - g. Identify what party is responsible for liability insurance coverage
 - h. Identify the invoicing process between schools for common programs
 - i. Identify marketing/recruiting responsibilities
 - j. Identify progress review meeting schedule and participants
 - k. Identify structure for adding additional community colleges or for the withdrawal of a community college from program

Sample Strategic Planning Meeting Agenda

Pre-work:

- Identify who needs to be at the meeting; Include those who have authority to allocate resources or change curriculum
 - Internal company – Human Resources, technical training, field managers, workforce development, community relations, program sponsor
 - External – educators, workforce boards, vocational school teachers, students
- Identify the objectives of the meeting
 - What are the issues with the current program?
 - Leadership/direction
 - Curriculum
 - Lack of student interest
 - What needs to be accomplished?
 - Additional resources assigned
 - Change in school and/or curriculum
 - Change in marketing
 - What will program success look like?
 - More students participating
 - More involvement by colleges and vocational schools

Agenda

- Overview of current program
 - Objectives
 - Scope
 - Expectations
 - Participants
- Status of program
 - # of participants
 - # of hires
 - Retention rate
 - Diversity makeup
- Program issues
 - Discussion from each stakeholder on what are the concerns
 - Does the program meet current expectations? If not, what's missing?
- What needs to be done to improve the program?
 - Is the program meeting expectations
 - Clarify or redefine the expectations
 - Identify short term goals
 - What changes need to be made?
 - Tie into themes
 - Recruitment – are we targeting the right groups?
 - Training – do we have the instructors and classrooms?
 - Resources – do we have the right people/groups overseeing the program?
 - Curriculum – are we teaching the right courses? Do they provide the students with the training needed for the internships?

- How will you measure the changes?
 - What performance measures need to be in place to assess progress
 - How will the data be captured and reported on
 - Who has responsibility for reporting on progress
- Next Steps
 - Review the short term goals
 - Define action steps to achieve the goals along with timeframes
 - Assign responsibility to each of the goals
 - Schedule regular update meetings to review progress

Potential Roadblocks to a Successful Program

If changes in technology, regulations/standards and student populations are not easily incorporated into the program, follow this checklist to determine what might be causing the problem.

1. Are there sufficient resources (instructors, classrooms, support people, money) available to make the change? If not:
 - a. Clearly identify what additional resources are required
 - b. Prepare a business case to present to employer and education leaders
 - c. Look at alternate solutions which might use less resources
 - d. Look at alternate sources of resources (workforce investment boards)
2. Does the educational staff have the capability and appropriate technical knowledge to change the program? If not:
 - a. Have the staff participate in training either at the employer's training facility or at a local vocational school
 - b. Look at alternate training staff such as retired utility workers
3. Has the employer clearly stated the skills, technical knowledge and physical requirements needed to do the work? If not:
 - a. Convene a meeting of technical training instructors, field managers/supervisors and union representatives to discuss the requirements of the jobs
 - b. Bring those requirements to the training/education organizations to review against the curriculum to identify changes
4. Are the lesson plans easy to change – new delivery mechanisms, new examples based on student population? If not:
 - a. Ask the students what types of learning delivery mechanisms work best for them
 - b. Convene the inhouse technical trainers and the educational instructors to review the curriculum for potential new delivery options such as online
5. Are the educational systems open to change? If not:
 - a. Bring the educators together with the employer leadership to discuss value and benefit of the program
 - b. Search out other educational partners who are more receptive to the program

Sample Budget Components

Labor

- Program administrator salary
- Adjunct instructors
- Summer internships

Material

- Recruitment material
 - Posters
 - Flyers
 - Brochures
 - Videos
 - Giveaways
- Internship equipment
 - Flame retardant clothing
 - Safety glasses
 - Small tools

Other

- Newspaper ads
- Trips for program benchmarking
- Meals for class tours, job shadowing, summer camp, etc.

Revenue

- Reimbursement for instructors

Sample Performance Measures

The following are some performance measures that can be used for assessing the progress and success of the program. Measures specific to your program should be identified by the Education/Industry Council.

Recruitment Efforts

- # of attendees at program awareness sessions
- # of high school/vocational students involved in career awareness activities
- # of these participants who actually enroll in program

Program Effectiveness

- # of students enrolled in program – total and by college (measure race/gender and age)
- # of students who drop out – capture the reasons (measure race/gender and age)
- # of students who graduate (measure race/gender and age)
- # of students hired – by position (measure race/gender and age)

Satisfaction

- Student satisfaction
- Manager/supervisor satisfaction

SAMPLE STUDENT SAFETY RECORD
WEEK OF XX/XX/2007

STUDENT NAME	WORK LOCATION	WORK ASSIGNMENT	HRS AVAILABLE	HRS WORKED	AVAILABILITY	TARDY	SAFETY INCIDENTS		
							FIRST AID	MOTOR VEHICLE	OSHA
John Doe	Palisades Electric	Maintenance Mechanic	40	32	80%	0	1	0	0
Total by Location	Palisades Electric		40	32	80%	0	1	0	0
Pete Smith	Southern Gas	Misc. Mechanic	40	40	100%	1	0	1	0
Total by Location	Southern Gas		40	40	100%	1	0	1	0
Total Student Population			80	72	90%	1	1	1	0

SAMPLE CLIENT SATISFACTION SURVEY

Please complete the following survey regarding the XXXX program. Your responses will be used to identify improvement opportunities for the program. Indicate a 1 if you strongly disagree with the statement and a 5 if you strongly agree.

1. The program provides me with the skills required to do the work during a summer internship.

1	2	3	4	5
Strongly disagree		Agree		Strongly agree

2. The task checklist for the summer internship provides me with exposure to all aspects of the job.

1	2	3	4	5
Strongly disagree		Agree		Strongly agree

3. The instructors understand the content of the training programs and clearly convey the concepts.

1	2	3	4	5
Strongly disagree		Agree		Strongly agree

4. The delivery of the training is interesting and designed to help me learn.

1	2	3	4	5
Strongly disagree		Agree		Strongly agree

5. The supervisors in the field help me understand the work tasks.

1	2	3	4	5
Strongly disagree		Agree		Strongly agree

6. Safety rules are clearly explained at the beginning of each job.

1	2	3	4	5
Strongly disagree		Agree		Strongly agree

7. What do you like best about the program?

8. What do you like the least about the program?

9. What changes would you like to see made to the program?

Sample Employability Skills Session

1. Resume writing practice and review
 - a. Have students bring in a draft resume
 - b. Review the key components of a good resume
 - c. Use several resumes as examples and rework
2. Interview skills training and practice
 - a. Review key steps in the interview process (behavior based questions, number of interviewers, etc.)
 - b. Have employees available to interview students in practice sessions
 - c. Provide feedback individually and as a group
3. Basic work ethic requirements
 - a. Have a field supervisor talk about work in the field
 - i. Be on time
 - ii. Come to work every day – what are the procedures if you cannot get to work
 - iii. Be prepared to work – no hangovers, have the right equipment and tools ready
 - iv. Work ethic – safety, teamwork, follow the rules
 - b. Have a union representative talk about the union requirements
 - i. Payment of dues
 - ii. Union grievance process
 - iii. Role of the shop steward

Formed in March 2006, the Center for Energy Workforce Development (CEWD) is a non-profit consortium of electric natural gas and nuclear utilities and their associations —Edison Electric Institute, American Gas Association, Nuclear Energy Institute, and National Rural Electric Cooperative Association. CEWD was formed to help utilities work together to develop solutions to the coming workforce shortage in the utility industry. It is the first partnership between utilities, their associations, contractors and unions to focus on the need to build a skilled workforce pipeline that will meet future industry needs.



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