

Milestone Plan

Use the questions below as a guide as you plan the activities and major milestones for the eight program elements listed on the attached Milestone Chart.

I put my additions in red font (written notes from my presentation in Dallas)

PARTNERSHIPS

Established for this project

- Who are the partners? Identify their roles and responsibilities. Perhaps create a written 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 organizations will be necessary to get 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 they need to dedicate to this project?
- What are the expected contributions from each partner?
- How will this partnership make decisions?
- How will you communicate between and among all the partners?

CAREER LADDER DEVELOPMENT

- Specify the rung on the ladder that the employees will be working towards.
- What are all the rungs leading up to this?
- Which occupation(s) are you building a ladder to?
- What is the business case for this? How will labor supply & demand affect recruitment and retention for these positions? How will these positions change over time (if at all)? Is your ladder aligned with your greatest business needs?
- Are the rungs on the ladder achievable for full-time working adults?
- What competencies will be required by the employer?
- What competencies will be required by the academic partner?
- How will remedial needs be assessed and provided for?
- How will the participants receive career coaching support?

COHORT SELECTION

- Identify criteria for selection of the cohort.
- How will you recruit applicants? What will your marketing campaign be within the employer organization?
- How will you assess the candidates' skills and educational levels...Accuplacer?
- What will you do if they have remediation needs? Will these be a pre-requisite to start the training?

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- Once participants are selected, you need to obtain all their demographic information for the UNC evaluation database you will need to fill out.
- Goal should be to start the cohort training within the first 6 months of this project.
- *Have you developed a recruitment and assessment plan for the initial cohort?*
- *What role will the education partner play?*
- *Who will have final say over selecting participants?*

WORK BASED LEARNING

- Identify the competencies needed for each rung on the ladder
- Determine what the curriculum needs to be to teach these competencies.
- Spend time planning with employer and educ. Partner what work related tasks can be used to teach these competencies.
- How will you assess the attainment of these competencies? What will be taught with WBL? What with didactics – with on-line learning? How did you decide what to teach with which method?
- How will you create group learning teams so the participants can support one another?
- *Are the academic learning outcomes relevant to the job/employer?*
- *What parts of the curriculum are most relevant to your Employees? Departments? Supervisors?*
- *How can the WBL be designed to make the supervisor's job easier? Make the department run better?*
- *How will you identify learning outcomes that can be taught through WBL? Which are they?*
- *Which job-related tasks can be used to teach the WBL outcomes? How will you involve line supervisors in identifying these tasks, and designing and scheduling the WBL activities?*
- *How will learning be assessed? By whom? What credentials does the college require them to have?*
- *How will employees be awarded credit for prior learning?*
- *Who will oversee/guide learning? What training will they receive?*
- *What is the logistical plan to account for work-day disruptions?*
- *What is the lesson plan that will help guide the WBL?*
- *How will other learning (training) be provided?*

EDUCATIONAL INSTITUTION

Practices and Policies

- Who needs to be on-board to create flexible curriculum and credits?
- Who will help convert the curriculum to WBL?
- Who will do the teaching? Who will train the supervisors?
- How will the participants be integrated into the college/university? Examples: Registration for student ID cards, computer access, emails, tours of the campus, resources on campus like learning centers, writing centers, career counseling, etc.
- What is the process in the college/university for getting training accredited? Start finding that out now- don't wait. Speak to the key people. Get them on your advisory group.
- *What internal stakeholders need to support (or not block) this effort? What is the plan to gain their buy-in?*
- *Will you need regulatory/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?*

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- *How will your WBL design improve the quality of your training program? How will that improved quality be assessed?*
- *How will you incorporate didactic learning, if necessary?*
- *What do you need to do to grant academic credit for this?*
- *How will you assess effectiveness of this training?*
- *How will you sustain this effort beyond the grant?*
- *What is your plan to draw state funding to sustain the initiative?*
- *Is the WBL plan being designed so that you can market it to other employers?*

EMPLOYER ORGANIZATION Practices and Policies

- *Who will be teaching? Supervisors? Preceptors?*
- *How and when will you bring them on board? What kind of training and orientation will you give them?*
- *What about release time for them? Incentives? Bonuses?*
- *How will you market this program to them? What kinds of supports are you going to build into the program for them?*
- *What about career counseling for the participants? Case management supports for them to help them cope with life and family issues that may arise?*
- *What are the pay scales going to be? Will they get promoted? Will they get a pay raise? How much?*
- *What HR policies must be created, adjusted or eliminated to support the ladder (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 (or not block) this effort? What is the plan to gain their buy-in?*
- *How will you train supervisors and reward or motivate them for supporting and engaging in the advancement of employees that report to them?*
- *Have you developed a system to assess results? Job satisfaction? Retention? Performance? Productivity?*
- *What is the plan to create career advancement opportunities that are available to the entire organization? How are they marketed/publicized?*
- *How will you sustain this effort beyond the grant?*

PROJECT MANAGEMENT CAPACITY

- *Make sure to document- all the changes you make ...the myriad of systems changes that you need to make in order to get this project off the ground...stories of failures and successes (see Spitfire Communications newsletter in your binders that you were given)*
- *Does the team have the skills necessary to effectively manage this project? If not, how will you get the right people participating?*
- *Have enough FTE's been committed to managing this?*
- *Does the designated manager have the commitment from the organization's executives? Board?*
- *Has an advisory group been created? Are all the key stakeholders on this advisory board who need to be in the room and need to buy-in? How often will they meet? Who will be responsible for convening this group and taking minutes? Who will be responsible for making sure that the suggestions and/or policies they come up with are actually implemented?*

ADDITIONAL ITEMS. Think of other things necessary for your project to get off the ground.

- Think of what approvals you will need at each stage and begin to reach out NOW to get the process started. Examples include: getting credit for WBL, getting credit for prior learning, HR approval of career ladder, HR approval of job titles, promotions, salary raises. Regulatory agencies? New occupational titles? State level policies?
- Think of sustainability after grant ends in 3 years.
- What changes can/should be made at each step of the way. Document these!
- How do you continually market your program so it's on the radar screen all the time – not just when you go to ask for more funding.
- Will you need/want additional funding? From whom? Employer? Educ. Partner? State? County?
- How do you involve the local workforce community at the beginning of the project, to get their input and resources and in case you want to apply to them for funds?
- How do you scale this up so it can impact on many more employees than just the initial cohorts?