

# Work-Based Learning Training Plan Companion Guide

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## Companion Guide Overview

### PURPOSE

The **Work-Based Learning (WBL) Training Plan Companion Guide** helps schools design, document, and implement high-quality WBL experiences that meet Indiana’s graduation requirements.

### WHAT THIS GUIDE INCLUDES

This guide provides step-by-step direction for completing the accompanying **Training Plan** and **Partnership Agreement**, the two required documents for any WBL experience that counts toward Indiana’s high school graduation requirements.

### WHO THIS GUIDE IS FOR

This guide is designed for a designated school-based WBL coordinator (the staff member responsible for overseeing Work-Based Learning, such as a counselor, teacher, or dedicated WBL coordinator). In some communities, however, an intermediary may take the lead in program design and complete the Training Plan Template on the school’s behalf.

**Note:** Throughout this document, “WBL Coordinator” refers to the designated school-based staff member overseeing the Work-Based Learning experience (for example, a counselor, teacher, or dedicated WBL coordinator).

### HOW TO USE IT

The Companion Guide, Training Plan and Partnership Agreement Templates, and Employer How-To Guide are designed to work together to support the design and documentation of high-quality WBL experiences.

- **Companion Guide**  
This is your step-by-step reference for completing the required templates. It provides context, guiding questions, and sample language to help schools or intermediaries design a strong WBL experience and accurately complete the Training Plan and Partnership Agreement.
- **WBL Training Plan & Partnership Agreement Template**  
These templates live within a single document and are both required for every WBL experience. The Training Plan outlines the student’s learning goals, competencies, and activities, while the Partnership Agreement formalizes the commitments of the school, employer, and any intermediary involved.
- **Employer How to Guide**  
This resource is intended for employers. It helps them plan and implement their portion of the experience, translating the Training Plan into meaningful workplace activities that meet learning goals.



Together, these resources create a shared framework among schools, intermediaries, and employers, ensuring each WBL experience is well-planned, clearly documented, and aligned with state requirements.

## BEFORE YOU BEGIN

Review the following section for an overview of Indiana’s WBL requirements. Understanding these expectations will help ensure that each Training Plan and Partnership Agreement meets the standards set by the Indiana Department of Education.

## Indiana Work-Based Learning Requirements

The following requirements define what qualifies a WBL experience for credit toward Indiana’s high school graduation requirements. Schools and partners should ensure each experience meets these criteria before finalizing the Training Plan and Partnership Agreement.

### REQUIREMENT FOR QUALIFYING WBL EXPERIENCES

- **Sustained Interaction with Industry Professionals:** A minimum of 25 hours per experience that includes direct supervision, task design and review, and ongoing mentorship.
- **Learning in Real or Simulated Workplace Settings:** May occur at an employer site, remotely, or in a school or career center setting that authentically models a workplace.
- **Authentic Work Experience Aligned with Competencies:** Student tasks must connect to industry-recognized competencies, with final assessments designed and evaluated by the employer or industry partner.
- **Written Partnership Agreement and Training Plan:** These documents outline learning outcomes, assessments, structure, schedule, and responsibilities, and must be signed by all participating parties. These documents must clearly articulate the following:
  - Clear articulation of projected learning outcomes and assessments, along with how and where learning will occur (for example, at a worksite, in a classroom, or through structured learning).
  - Identification of career pathways that align with the student’s work experience, interests, and regional labor-market demand.
  - A detailed description of the work experience, including duration, compensation, and participant expectations.
  - Defined partner expectations and roles, specifying financial investments, supports provided, and staffing or supervision requirements.

For a more detailed explanation of these requirements, including examples, definitions, and state guidance, refer to the [Indiana Work-Based Learning Requirements Guide](#).



## Phase 0: WBL Planning & Support Team

### STEP I: ORGANIZE INTERNAL ROLES & RESPONSIBILITIES

Before launching or documenting any WBL experience, schools should ensure their internal systems, roles, and partnerships are clearly defined. This phase helps establish who is responsible for coordinating WBL, how employers are engaged, and what information needs to be gathered before completing the Training Plan Template.

**Owner:** School leadership, WBL coordinator, or designated liaison

**Action:**

- Identify the school staff responsible for WBL coordination, employer outreach, and student support.
  - Define how the school will identify and vet employer partners.
  - Establish internal workflows for collecting employer information, completing the Training Plan Template, and tracking student experiences.
- Use the [WBL Planning Team Roles & Responsibilities template](#) to record responsibilities and decision-making processes.

### STEP II: MAP EMPLOYER LANDSCAPE & PARTNERSHIP

A high-quality WBL experience starts with understanding the employer's environment. Identify employers or industries in your community that can offer authentic work experiences.

**Owner:** WBL coordinator or designated liaison, in collaboration with employer partner(s)

**Action:**

- Use existing partnerships, advisory boards, or local chambers to identify potential employer partners.
  - Assess each employer's ability to host students safely and meaningfully.
  - Gather basic information (industry, location, supervision capacity).
- Use the [Employer Opportunity Assessment Worksheet](#) to record potential partners and determine if employers can offer meaningful experiences.



### STEP III: FORMALIZE EMPLOYER PARTNERSHIP

Once a strong potential partner has been identified, move from exploration to commitment. This step ensures both the school and employer have a shared understanding of what students will do, how often they will engage, and what success looks like for everyone involved.

**Owner:** WBL coordinator or designated liaison, in collaboration with employer partner(s)

**Action:**

- Confirm the employer’s interest, capacity, and readiness to host students, including supervision and safety considerations.
  - Discuss the structure of the experience- timing, setting, duration, and frequency of engagement.
  - Begin identifying what students will do, learn, and practice through authentic projects or tasks that align with the employer’s work.
  - Capture key decisions to inform the Training Plan and Partnership Agreement in the next phase.
- ➔ **Provide the [Employer How-To Guide](#) to help the employer plan their role. The guide walks them through defining the experience structure, selecting competencies and tasks, and planning logistics such as supervision, materials, and communication.**



## Phase I: Experience Overview

Before mapping tasks or competencies, start by establishing the foundation of the WBL experience. This phase aligns directly with the “Experience Overview” section in the Training Plan Template and ensures that the opportunity is purposeful, aligned with student goals, and feasible for the employer.

### STEP I: UNDERSTAND STUDENT GOALS

Before matching a student to an experience, take time to understand their interests, prior learning, and long-term goals. These conversations should explore not only what the student wants to learn, but also how the experience supports their chosen graduation pathway and the diploma seal they intend to earn.

**Owner:** WBL coordinator or designated liaison

**Action:**

- Meet with the student to review career interests, prior coursework, and readiness for WBL.
- Identify desired outcomes or skills to develop through the experience.
- Confirm alignment with graduation pathway and diploma seal requirements.

➔ Document these details in the **Student Information** section of the [Training Plan Template](#).

### STEP II: IDENTIFY THE TYPE OF WBL EXPERIENCE

Selecting the right type of WBL experience ensures the opportunity fits the student’s goals, readiness, and schedule while matching the employer’s ability to provide a meaningful experience. Choosing the correct type helps ensure the experience meets Indiana’s definition of WBL and qualifies toward diploma seals.

**Owner:** WBL coordinator or designated liaison, in collaboration with employer partner(s)

**Context:** Indiana recognizes 11 types of WBL, ranging from school-based experiences to full apprenticeships. Each type satisfies the state’s definition of WBL but varies in setting, duration, and purpose. Each experience type can count toward all diploma seals if it meets IDOE’s WBL definition.

For detailed descriptions, examples, and recommended diploma seal alignments, refer to the official [Menu of Work-Based Learning Experiences](#) published by the IDOE. Ascend developed [overviews of each WBL experience](#) for reference.

**Action:**

- Review the Menu of WBL Experiences with the employer and student.
- Discuss which option best fits the student’s goals and the employer’s capacity.
- Verify that the experience meets all four core WBL criteria:
  - Minimum 25 hours of interaction with industry professionals.
  - Learning occurs in a real or simulated workplace setting.



- Tasks are authentic and age appropriate.
- A Training Plan and Partnership Agreement are completed and signed by all partners.

→ Document the selected experience in the **Type of WBL Experience** section of the [Training Plan Template](#).

### STEP III: CONFIRM WBL SCHEDULE, COMPENSATION & SUPERVISION

Confirming the schedule and compensation details early helps all partners start the experience with clear expectations and a shared plan.

**Owner:** WBL coordinator or designated liaison, in collaboration with employer partner(s)

**Action:**

- Confirm start and end dates, weekly hours, and student availability.
- Verify supervision plans and any required worksite approvals.
- Clarify compensation structure (paid, unpaid, or for credit) and confirm compliance with labor laws and district policies.
- Ensure all partners agree to the final schedule and terms.

→ Document the selected experience in the **Employer Information, Work Schedule and Compensation Information** sections of the [Training Plan Template](#).

## Phase II: Training Plan Table

With the foundational elements in place, the next step is to design the experience itself. The Training Plan translates the big ideas like the student goals, employer capacity, and WBL type into a roadmap of competencies, tasks, and milestones that make the experience structured, purposeful, and aligned to learning outcomes.

To ensure the training plan design reflects employer needs and capacity, reference the [Employer How-To Guide](#) when completing this section. If the guide has not been completed, follow the steps outlined below and validate details with the employer before finalizing the plan. This guide should have been shared with the employer during the Solidify Employer Partnership phase. If it was not completed at that time, follow the steps outlined below and confirm all details directly with the employer before finalizing the plan.

A strong WBL Training Plan connects what students do to what they learn. It serves as a shared reference point for the student, employer, and school, clearly defining expectations for supervision, feedback, and evaluation.

The following steps guide the design of the Training Plan to ensure every experience is intentional, measurable, and meets Indiana's WBL requirements for graduation.

### STEP I: IDENTIFY & SELECT COMPETENCIES



Competencies describe what students will learn and demonstrate during their Work-Based Learning (WBL) experience. They connect classroom instruction to real-world practice and ensure each placement produces measurable growth aligned to IDOE standards. Establishing these competencies early provides a foundation for designing meaningful activities, supervision, and evaluation in later steps.

If competencies were already identified during the Solidify Employer Partnership phase, reference the Employer How-To Guide or employer worksheet here rather than starting from scratch. Confirm selections with the employer before moving forward.

If the competencies have not been identified, Ascend developed a [Business Generalist](#) and [Generative AI](#) competency set that can be leveraged across a range of WBL experiences. The following are also included as references for examples of competencies: **Indiana Department of Workforce Development’s [Indiana’s Employability Skills Benchmarks](#)**, the **U.S. Department of Labor’s [O\\*NET](#)**, the **CTE’s [NLPS Review Document](#)**, or any existing employer validated competency sets.

**Owner:** School liaison or intermediary (first pass); employer partner (validation and final agreement)

**Action:**

- Review available roles and projects. Meet with the employer to understand the work students may engage in and the skills those experiences could build.
- Draft initial competencies. The school liaison or intermediary should complete a first pass based on the student’s goals, role description, and alignment to IDOE standards.
- Collaborate with the employer. Review the draft list together to confirm which competencies are realistic, observable, and meaningful within the workplace setting.
- Select a focused set of competencies. Choose competencies that reflect both student goals and employer expectations:
  - *3–5 Technical Competencies* – industry-specific skills students will learn directly from the employer.
  - *Up to 5 Employability Competencies* – transferable skills that support workplace readiness

➔ Document the **final competencies** in the Competency column of the [Training Plan Template](#).

**Mapping Technical Skills:**

Competency	Task/Activity	Location	Timing	Target Proficiency Level	Evaluation Method
<i>Support the planning and coordination of events or projects by managing timelines, logistics, and tasks.</i>					



*Operate basic office and digital tools (e.g., printers, databases, spreadsheets) effectively to complete tasks and support team operations.*

**Mapping Employability Skills:**

Employability Skill	Competency	Task/Activity	Location	Timing	Target Proficiency Level	Evaluation Method
<b>Effective Communication</b>	<i>Apply skills to clearly, effectively, and convincingly express ideas and messages to others appropriate to the environment.</i>					

**STEP III: MAP COMPETENCIES TO TASKS & ACTIVITIES**

With competencies clearly defined, the next step is to identify the specific tasks and projects that will allow students to apply and strengthen those skills in real settings. This step translates the agreed-upon competencies into day-to-day activities that add value for the employer and create measurable learning for the student.

**Owner:** WBL coordinator or designated liaison, in collaboration with employer partner(s)

**Action:**

- Review each competency with the employer and determine what authentic work aligns with it.
- Design tasks or projects that let students practice and demonstrate the skill.

➔ Document the **agreed-upon tasks** in the **Tasks/Activity** column of the [Training Plan Template](#).

**Mapping Technical Skills:**

Competency	Task/Activity	Location	Timing	Target Proficiency Level	Evaluation Method
Support the planning and coordination of events or projects by managing timelines, logistics, and tasks.	<i>Create &amp; maintain a project plan or checklist to track deliverables</i>				
Operate basic office and digital tools (e.g.,	<i>Maintain shared digital files &amp; folders by organizing &amp;</i>				



printers, databases, spreadsheets) effectively to complete tasks and support team operations.

*updating documents in shared drives (e.g., Google Drive, OneDrive)*

**Mapping Employability Skills:**

Employability Skill	Competency	Task/Activity	Location	Timing	Target Proficiency Level	Evaluation Method
<b>Effective Communication</b>	Apply skills to clearly, effectively, and convincingly express ideas and messages to others appropriate to the environment.	<i>Communicate with external partners, customers, or visitors using appropriate tone and professionalism.</i>				

**STEP IV: DEFINE WHERE LEARNING OCCURS**

With competencies and tasks identified, determine where each learning activity will take place. This ensures clarity for supervision, scheduling, and compliance, and helps align expectations between schools and employers.

**Owner:** WBL coordinator or designated liaison, in collaboration with employer partner(s)

**Action:**

- For each task, indicate whether learning occurs:
  - On the Job (OTJ): at the employer’s worksite or remotely under supervision
  - In School: during classroom or lab-based preparation and reflection
  - Hybrid: a combination of on-site and in-school work

➔ Document the **location for each task** in the **Location** column of the [Training Plan Template](#).

**Mapping Technical Skills:**

Competency	Task/Activity	Location	Timing	Target Proficiency Level	Evaluation Method
Support the planning and coordination of events or projects by managing timelines, logistics, and tasks.	Create & maintain a project plan or checklist to track deliverables	<i>On-the-Job</i>			



Operate basic office and digital tools (e.g., printers, databases, spreadsheets) effectively to complete tasks and support team operations.

Maintain shared digital files & folders by organizing & updating documents in shared drives (e.g., Google Drive, OneDrive)

*On-the-Job*

**Mapping Employability Skills:**

Employability Skill	Competency	Task/Activity	Location	Timing	Target Proficiency Level	Evaluation Method
<b>Effective Communication</b>	Apply skills to clearly, effectively, and convincingly express ideas and messages to others appropriate to the environment.	Communicate with external partners, customers, or visitors using appropriate tone and professionalism.	<i>On-the-Job</i>			

**STEP V: SET TIMING & TARGET PROFICIENCY LEVEL**

Next, specify when learning will occur and how far the student is expected to progress during the placement. These details ensure the experience is structured, measurable, and aligned to both the student’s readiness and the employer’s capacity.

**Owner:** WBL coordinator or designated liaison, in collaboration with employer partner(s)

**Action:**

- Define the time frame for each task or competency (e.g., Weeks 1–4, Q1, Semester 1).
- Determine the target proficiency level the student should reach by the end of the experience:
  - Novice: Completes tasks with regular guidance and support
  - Developing: Completes tasks with occasional guidance or coaching
  - Proficient: Completes tasks independently, demonstrating consistent skill and seeking feedback for improvement

➔ Record the **timing and target proficiency level** for each competency in the [Training Plan Template](#).

**Mapping Technical Skills:**



Competency	Task/Activity	Location	Timing	Target Proficiency Level	Evaluation Method
Support the planning and coordination of events or projects by managing timelines, logistics, and tasks.	Create & maintain a project plan or checklist to track deliverables	On-the-Job	August 2025	Developing	
Operate basic office and digital tools (e.g., printers, databases, spreadsheets) effectively to complete tasks and support team operations.	Maintain shared digital files & folders by organizing & updating documents in shared drives (e.g., Google Drive, OneDrive)	On-the-Job	Sept. 2025	Proficient	

#### Mapping Employability Skills:

Employability Skill	Competency	Task/Activity	Location	Timing	Target Proficiency Level	Evaluation Method
<b>Effective Communication</b>	Apply skills to clearly, effectively, and convincingly express ideas and messages to others appropriate to the environment.	Communicate with external partners, customers, or visitors using appropriate tone and professionalism.	On-the-Job	October 2025	Developing	

## STEP VI: SELECT EVALUATION METHODS

Finally, identify how each competency will be evaluated and how results will be captured. Evaluation ensures accountability, provides meaningful feedback for the student, and helps verify the WBL experience meets diploma requirements.

**Owner:** WBL coordinator or designated liaison, in collaboration with employer partner(s)

#### Action:

- Choose one or more evaluation methods for each competency. Examples include:
  - Supervisor Evaluation: Direct observation and feedback from the employer.
  - Project-Based Assessment: Completion of a defined deliverable demonstrating the competency.
  - Portfolio Review: Collection of artifacts, reflections, or work samples showing growth.
  - Performance Observation: Coordinator observes the student applying skills in real time.
  - Digital or Written Assessment: Quiz, reflection, or digital tool assessing skill mastery.



Schools should proactively request evaluation input from employer partners at agreed-upon intervals. Once evaluations are completed, the school or intermediary WBL coordinator is responsible for collecting employer feedback, documenting results in the Training Plan Template, and ensuring outcomes are recorded in the school’s tracking system as required for diploma accountability.

➔ Document the **selected evaluation method** for each competency in the Evaluation Method columns of the **Training Plan Template** noting when employer input will be collected.

**Mapping Technical Skills:**

Competency	Task/Activity	Location	Timing	Target Proficiency Level	Evaluation Method
Support the planning and coordination of events or projects by managing timelines, logistics, and tasks.	Create & maintain a project plan or checklist to track deliverables	On-the-Job	August 2025	Developing	<i>Supervisor Evaluation – April or May</i>
Operate basic office and digital tools (e.g., printers, databases, spreadsheets) effectively to complete tasks and support team operations.	Maintain shared digital files & folders by organizing & updating documents in shared drives (e.g., Google Drive, OneDrive)	On-the-Job	Sept. 2025	Proficient	<i>Portfolio - April or May</i>

**Mapping Employability Skills:**

Employability Skills	Competency	Task/Activity	Location	Timing	Target Proficiency Level	Evaluation Method
<b>Effective Communication</b>	Apply skills to clearly, effectively, and convincingly express ideas and messages to others appropriate to the environment.	Communicate with external partners, customers, or visitors using appropriate tone and professionalism.	On-the-Job	October 2025	Developing	<i>Supervisor Evaluation - April or May</i>

## Phase III: Partnership Agreement

Every WBL experience must include a **Partnership Agreement that complements the Training Plan**. While the Training Plan defines what students will learn and do, the Partnership Agreement defines how partners will collaborate to make it happen. It establishes shared responsibilities among the student, school, employer partner(s), and, when applicable, an intermediary or external partner.



Together, the Training Plan and Partnership Agreement create a clear, transparent foundation that keeps all stakeholders aligned and accountable.

## STEP 1: FORMALIZE PARTNER ROLES & RESPONSIBILITIES

With the Training Plan finalized, create a Partnership Agreement that defines how each partner will support the WBL experience. The agreement outlines commitments, responsibilities, and supervision expectations. Leverage the Planning Tool developed in the [WBL Planning Team Roles & Responsibilities template](#) at the start of the experience to inform the creation of the Partnership Agreement and ensure clarity across all parties.

**Owner:** WBL coordinator or designated liaison in collaboration with employer partner(s). An intermediary may also support or own the formalizing of the partnership agreement.

### Action:

- Use the Partnership Agreement Template to outline partner roles, responsibilities, and commitments.
- Confirm all required signatures and distribute final copies to partners.
- Establish a schedule for check-ins, progress updates, and feedback as needed.

➔ Document [partner roles and commitments](#) in the [Partnership Agreement](#) section of the [Training Plan Template](#).

## Implement, Monitor, and Report the Experience

After the Training Plan and Partnership Agreement are finalized, this stage brings both documents to life. Regular communication, reflection, and feedback help students connect daily work to broader learning goals and keep all partners aligned throughout the experience.

The WBL coordinator or designated liaison should maintain ongoing communication with the employer and student through scheduled check-ins or progress meetings. These conversations ensure that expectations remain clear and that any challenges can be addressed quickly. The Training Plan should serve as a living document that can be adjusted as responsibilities, timelines, or supports evolve.

As the experience concludes, confirm that all commitments have been met and documentation is complete. Review the finalized Training Plan and supervisor evaluation to assess the student's progress toward each competency. Verify hours and attendance, and collect feedback from the student, employer, and school liaison to identify strengths and areas for improvement. Once all materials are finalized, share a copy of the signed Training Plan and Partnership Agreement with all those listed in the partnership agreement. A digital or physical copy should also be kept on file should the IDOE ever request a copy of the Training Plan and Partnership agreement.



If you are the individual reporting the WBL experience through Indiana’s CTE data collection system, InTERS, the following information from the Training Plan and Partnership Agreement will need to be reported within InTERS. For more information, refer to the [Work-Based Learning Reporting Guidance](#) released by Indiana Commission for Higher Education in August 2025.

### Information to Report on InTERS

The **name of the company/business/entity** of where the student is working.

Student’s employment **start & end dates**.

The **expected on-the-job (OTJ) hours** the student will have at the placement.

**Name & contact information** for the student’s **direct supervisor**.

If applicable, the **name of the intermediary** facilitates the student’s WBL experience.

The **Standard Occupational Classification (SOC) code** that closely relates to the occupation of the student’s WBL experience.

The **actual on-the-job (OTJ) hours** the student completed.

Certifying the existence of a **partnership agreement**.

