# The planning cycle for Industry placements

## Support for T LEvel providers

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| **Introduction** | This resource will help you organise high-quality industry placements in good time.  As an integral component of T Levels, industry placements could take a year to organise and so your planning cycle should start at least 12 months before placements are needed.  This will give you enough time to prepare high quality placements and to integrate them with the rest of the programme. |
| **Who is it for?** | Subject leads, curriculum leads, industry placement leads heads of department |
| **How to use this resource** | The resource consists of:   * Task lists for each phase of the planning cycle * Checklists and templates to support the process.   The process described in this resource should fit with your broader planning cycle for programmes and courses, e.g. defining the offer, timetabling, staffing |

**Task lists**

There are four task lists in this resource:

***Phase 1 – set up and start***

***Phase 2 – engagement and development***

***Phase 3 – detailed planning and student selection***

***Phase 4 – final preparation (after selecting the student)***

Phases are presented in sequence, but the order is not prescriptive, and not intended to be sequential. You’ll need to tackle this in a way that suits your organisation and where you are in implementing industry placements.

Use the task lists to:

* Identify what has to be done during the phase
* Allocate tasks to team members.

The tasks in the phases are likely to be shared among staff involved in:

* Employer engagement and development
* Curriculum design
* Course delivery
* Student support.

**Checklists and templates**

These checklists and templates are to be used in relevant phases:

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| --- | --- |
| **Checklist or template** | **Phase** |
| ***Employer engagement process*** | Phase 1 |
| ***Employer engagement adviser roles and responsibilities*** | Phase 1 |
| ***Business development needs analysis*** | Phase 2 |
| ***Employer charter*** | Phase 3 |
| ***Feedback questions*** | Phase 4 |

There is also a checklist for reviewing your industry placement process each year.

## Phase 1 – set up and start

| phase 1 key outcomes | your notes |
| --- | --- |
| Targets set; marketing plan; engagement processes and system agreed; responsibilities allocated; training planned; engagement started. |  |

| phase 1 tasks | your notes |
| --- | --- |
| 1. Set a **target for the number of industry placements** needed next year, considering:  * labour market and economic analysis * your target cohort volumes for T Levels and associated occupational specialisms   (you might it useful to use the Planning a strategic approach for your T Level Offer resource) |  |
| 1. Outline the **types of employers** you’re looking for, taking account of occupational specialisms. The information you may need to define the types of employers you’re looking for could include:  * The industry or sector they operate in * The specific products they produce or services they provide * Specialist equipment used. |  |
| 1. Set targets for the **number of industry placements** needed in each type of employer. |  |
| 1. Decide **who is responsible** for meeting the targets. |  |
| 1. **Break down the overall targets into measurable indicators**, e.g.:  * Number of employers contacted at each stage (leads generated, initial contact, interest registered, planning discussions ) * Number of industry placements obtained, by employer type. |  |
| 1. Agree a **marketing plan**:  * Use a current plan * Develop a plan if none exists, or if the organisation takes a subject-based rather than a centralised approach to marketing * Check that the plan includes a range of activities, such as events to celebrate students’ success, regular updates, invitations to join employer boards, PR opportunities for employers |  |
| 1. Agree the **process for engaging employers** (see checklist ‘Employer engagement process’):  * Use an existing process * Devise a process if none exists, or if the organisation takes a subject-based rather than a centralised approach to engage employers * Check that the process covers the main stages, i.e. awareness-raising, lead generation, conversion and planning. |  |
| 1. Agree **the system for recording employers’ details** and contacts with employers:  * Use an existing system, e.g. customer relationship management (CRM) system, spreadsheet or database * Devise a system if none exists, or if the organisation takes a subject-based rather than a centralised approach to recording employer details and contacts. |  |
| 1. Identify whether any **adjustments to the process and system** are needed, e.g. timing, special requirements. |  |
| 1. **Allocate roles and responsibilities** for implementing and managing the process and system (see checklist ‘Employer engagement adviser roles and responsibilities’). |  |
| 1. Identify any **skills and knowledge gaps** and plan training. |  |
| 1. Start **implementing the marketing and employer engagement plans**. |  |

## Phase 2 – engagement and development

| phase 2 key outcomes | your notes |
| --- | --- |
| Progress monitored; critical success factors identified; planning process agreed; relationships developed and consolidated through planning process; targets reviewed; changes made to improve performance if needed. |  |

| phase 2 tasks | your notes |
| --- | --- |
| 1. **Monitor progress** towards targets, using the metrics agreed in Phase 1 (Task 5). |  |
| 1. **Refresh the marketing plan** to reflect developments, e.g.:  * **Changes in policy** which incentivise employers to offer industry placements, such as increases in cash incentives * **Opportunities to engage employers** by including industry placements in their COVID recovery plans. |  |
| 1. **Analyse the information** contained in employer contact records to identify:  * **Progression rates** though the stages of engagement from initial discussions to conversion * Critical factors **why employers disengage** at each stage * **Factors which make them more likely to continue** from one stage to the next. |  |
| 1. Agree the **process for planning industry placements** with employers:  * Use an existing process * Devise a process if none exists, or if the organisation takes a subject-based rather than a centralised approach to develop relationships with employers. |  |
| 1. Check that the **process covers all major planning items**, including:  * Health and safety, risk assessments and insurance * Alignment between the industry placement and the curriculum through learning outcomes. |  |
| 1. **Develop the relationship with employers** who agree to offer industry placements by moving them into the planning process. |  |
| 1. **Consolidate the relationship** with employers during the planning process, e.g.:  * Discuss how you could support their wider workforce requirements through apprenticeships, Kickstart and other programmes (see template ‘Business development needs analysis’) * Invite them to contribute to local skills improvement plans * Explore other avenues for employers to be involved, such as curriculum design, insights, training, access to specialist resources and equipment. |  |
| 1. **Review progress** against targets and decide whether to:  * Continue with the plan as agreed in Phase 1 if targets are being met * Make changes to improve the rate of success. |  |
| 1. **Agree changes to improve performance** against targets if needed, e.g.  * Increase awareness levels using different promotional tools such as targeted advertising * Intensify lead generation using different methods and channels such as external agency support * Drive conversions by increasing contact frequency, deploying a wider range of staff, promoting the benefits. |  |

## Phase 3 – detailed planning and student selection

| phase 3 key outcomes | your notes |
| --- | --- |
| Industry placement model agreed; placements planned in detail; selection process agreed; students selected for placements; contingency plan devised if there are not enough suitable placements. |  |

| phase 3 tasks | your notes |
| --- | --- |
| 1. Select an **industry placement model** with the employer which:  * Matches the employer’s preferences for timing given seasonality of work, holidays, weather, available projects. (see checklist ‘Employer charter’) * Gives students sufficient breadth and depth of work experience in their occupational specialisms * Enables students to apply their classroom learning * Works around key dates, e.g. exams. |  |
| 1. **Flex the model to** meet the employer’s and students’ needs as far as possible, e.g. by considering:  * Whether the use of online learning could make the timing of placements more flexible * Splitting the placement between two employers to give students more breadth and/or depth of experience and making sure learning objectives are complementary. |  |
| 1. **Plan each placement** in detail, including:  * The industry placement role * How the role links to the student’s classroom learning * Dates, hours and location of the placement * Support for the student at the placement, e.g. supervisor, mentor * Communication with the student and employer during the placement. |  |
| 1. Agree a **process for selecting students** which:  * Allows students to make a positive choice of employer and placement * Gives students a realistic experience of going through a selection process * Enables the employer to select a student who matches their criteria * Is open and fair. |  |
| 1. Help the **employer to prepare selection documentation** including:  * Information about the employer and placement * Role description * Person specification * Standard interview questions and scoring sheets. |  |
| 1. **Take part in the selection process** as agreed with the employer, e.g.:  * Shortlist students * Explain the process to students and help them prepare * Be on the interview panel * Debrief students afterwards. |  |
| 1. **Review progress against targets**; if there are not enough placements, decide whether to:  * Continue with the revised plan as agreed in Phase 2 * Make further changes to try and reach the target * Make a contingency plan in case the target is not reached. |  |
| 1. **Devise a contingency plan** if there are not enough placements for all students, e.g.  * **Delay placements** until later in the course, to give more time to find new employers * See whether employers with placements already agreed would c**onsider offering placements for other roles** as well * **Discuss the option with employers of ‘doubling up’**, i.e. enabling additional students to take up a placement role already agreed. |  |

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## Phase 4 – final preparation (after selecting the student)

| phase 4 key outcomes | your notes |
| --- | --- |
| Contingency plans implemented if needed; readiness checks carried out; feedback process in place; pastoral care agreed. |  |

| phase 4 tasks | your notes |
| --- | --- |
| 1. **Implement contingency plans** if there aren’t enough placements. |  |
| 1. **Check with employers to make sure everything is ready** to welcome students to their placements including:  * Induction * Contact information. |  |
| 1. Check that **supervisors, mentors and other employer staff involved in supporting students on their placement are briefed on their roles**. |  |
| 1. **Finalise dates for student reviews**. |  |
| 1. Agree the **process for recording feedback** from students and employers (see checklist ‘Feedback questions’):  * Use an existing process * Devise a process if none exists, or if the organisation takes a subject-based rather than a centralised approach to recording feedback. |  |
| 1. **Agree pastoral support** and care for each individual student, including placements that take place:  * Outside normal opening hours * During holidays. |  |

## YEAR END REVIEW

| actions for year end | your notes |
| --- | --- |
| 1. **Reflect** with employers, staff and students on:  * Success of industry placements * Lessons learned. |  |
| 1. Identify how to **improve future placements**, e.g.  * Use different models * Strengthen links between placements and classroom learning * Intensify student support. |  |
| 1. **Identify positive experiences** of employers providing industry placements which could be shared with:  * Employers who are offering them for the first time * Employers interested in offering them but not yet committed * Employers generally, through your marketing activities. |  |
| 1. **Develop case studies** using these experiences. |  |
| 1. Analyse feedback from staff, employers and students and use the information to identify ways **of improving the quality of placements.** |  |
| 1. Document the improvements and **create an action plan** with staff, employers and other stakeholders. |  |
| 1. **Integrate the action plan** into your quality improvement cycle. |  |

## checklists and Templates

#### Employer engagement process

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| --- | --- |
| **Internal context** | How does the process of developing a bank of employers offering high-quality industry placements:   * Support your organisation’s overall strategy for working with employers? * Link to other ways in which employers are involved in supporting students, e.g. work experience, continuing professional development of staff, and student Insights? |
| **External context** | How well does the process:   * Help employers to see the benefits of being involved in industry placements? * Involve other stakeholders such as sector bodies, local employer networks, LEPs, Chambers of Commerce, other providers, and universities? * Use accurate, up-to-date information about skills gaps, priority industries, regional growth plans to target employers? |
| **Principles** | How fully does the process meet the following principles?   * To develop effective, long term relationships with employers to support their skills needs. * To provide professional and effective staff who work with employers to identify the benefits of industry placements and help to develop them. * To coordinate all communication with key employers, keeping information up to date and secure. |
| **Objectives** | Does the process meet the following objectives?   * Increase employers’ awareness of how they can support students through industry placements. * Generate enough employers to offer high-quality industry placements to all students who need one. * Give employers confidence in your organisation’s professional, well-managed approach, e.g. by recording and tracking employer interactions accurately. |
| **Activities** | Does the process include the following activities?   * Use forums and other events to gain employers’ input into how the curriculum and industry placements could support their business. * Create clear lines of communication between everyone involved, to avoid duplication and confusion for employers. * Use a single point of contact for enquiries and interactions about industry placements. * Define and document your organisation’s commitment to quality of service that when engaging employers with industry placements [Template 2 – Employer Charter]. * Identify targets to be achieved by whom, by when and how success/ impact will be measured. |
| **Impact** | Does the process include the following impact monitoring and review measures?   * Performance against the number and type of industry placements required. * Feedback from employers about the process all stages of developing and running industry placements. * Contribution to employers’ business. |

#### Employer engagement adviser roles and responsibilities

| Activity | Service standards | Links to CRM / tracking |
| --- | --- | --- |
| **Receive employer enquiries for in-depth support or information** | * Contact employer within 24 hours * Make an appointment to visit within 7 days. | Update CRM with any new information and confirmed visit date |
| **Send marketing emails** | * Provide:   + Organisation name   + Your name   + Your department, title or role * Greeting to be friendly, polite, interested and professional. | Use standard email templates (from the CRM if possible) |
| **Visit employers and carry out Business Needs Analysis** | * Carry out Business Needs Analysis (BNA) using the approved tool * Record BNA results on to the CRM * Develop an action plan with the employer to include:   + Activity   + By whom   + By when   + How outcome to be communicated. | Update CRM on findings, agreed action and timeframe  CRM to report on employer requirements, trends, outcomes, to inform planning |
| **Create good working relationships across your organisation** | * Arrange regular network opportunities with other staff and departments * Share information and feedback from employers and updates on products and services * Keep up to date literature available:   + Directory of services to business   + Prospectus   + Access to intranet   + Website updates   + Other useful websites   + Marketing updates. |  |
| **Demonstrate the flexibility of offer available to employers** | * Explain the opportunity for employers to design flexible industry placement models to match their needs * Tell employers about other services which may benefit them, in addition to industry placements. | Update CRM with the details of the referral and when the lead should next be followed up |
| **Negotiate support required with other departments**  **Confirm offer** | * Contact departments and negotiate employer support required within 2 days of completing the BNA * Confirm the employer’s offer to provide industry placements and the action will be taken. | Record updated on the CRM with flags to remind BDA of response dates or further action required |
| **Signpost employer to alternative provision if needs cannot be met by your organisation** | * Check alternative provider details * Inform employer of alternative providers and offer:   + Organisation name   + Contact name   + Contact number. | Update employer lead with information on the need and where the employer was referred to |
| **Conclude employer visits professionally, agree outcomes and plan next steps** | * Summarise the agreed outcomes, actions and timeframe for actions to be taken with the employer * Check that all information requirements have been covered. * Check that the customer is satisfied with this outcome and record their response * Confirm contact details for further enquiries. | Employer record to include an opportunity to record level of satisfaction with BDNA |
| **Maintain links with the employer (Account Management)** | * Inform the employer who will be their first line of contact and provide direct contact details * Contact the employer on an agreed basis to ensure satisfaction and any further development needs. | Update CRM after every employer contact |
| **Review industry placements when they have ended** | * Contact employers and carry out a review as part of the satisfaction / feedback survey * Inform the employer how their feedback will be used and how it will link to future planning and improving services * Confirm to the employer that they will receive a follow up after no more than 6 months to ensure that the support provided was appropriate and to identify any further needs. | Record results in the CRM  Employer to be entered into a 6 monthly satisfaction survey |

#### Business development needs analysis

**Introduction**

A structured business development needs analysis (BDNA) should give you valuable intelligence about the reasons why employers offer industry placements. It may also identify other ways in which the employer could support students, staff and the organisation.

A business needs analysis should be carried out with each newly-engaged employer, and refreshed every three years.

Information gathered should be uploaded quicky to you customer relationship management (CRM) or other recording system, so it’s available to everyone involved with the employer.

|  |  |
| --- | --- |
| **Business name:** | **Date visited:** |
| **Engagement consultant:** | **Organisation type:** |
| **Primary contact:** | **Contact’s position (job title):** |
| **Telephone:** | **Email:** |

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| --- |
| **Main address / telephone:** |
| **Landmark/directions:** |

**Background / Overview**

***General business information***

|  |  |
| --- | --- |
| Key areas of business |  |
| Customers |  |
| Locations and sites |  |
| Headcount |  |
| Turnover and profit |  |
| Year-end date |  |
| Growth plans |  |
| Current initiatives |  |
| Vision and values |  |
| Career development. |  |

***Information to plan industry placements***

|  |  |
| --- | --- |
| Working environment |  |
| Working hours |  |
| Patterns of work |  |
| Dress code |  |
| Supervision |  |
| Mentoring |  |
| What sets the organisation apart from competitors? |  |
| What makes people want to work here? |  |

***Skills***

|  |  |
| --- | --- |
| Are there any industry or sector skills shortages? |  |
| What is the skills development policy – recruit or train? |  |
| Are there departments with a pressing skill need? |  |
| What is the current talent pipeline – school leaver, graduate, apprenticeship? |  |
| Are there seasonal peaks requiring additional skilled or unskilled resource? |  |

***Industry placements***

|  |  |
| --- | --- |
| Is the employer already considering offering industry placements? |  |
| What benefits do they require from offering industry placements? |  |
| Do they have staff that would benefit from supervisory or mentoring experience? |  |
| How else might they like to work with our organisation? |  |
| What experience do they have of Apprenticeships, T Levels, internships? |  |

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| --- | --- |
| **Actions agreed during visit** | **Details** |
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|  |  |
|  |  |

|  |  |
| --- | --- |
| **Post-visit checklist** | **Details** |
| Thank you email summarising visit and agreed actions. |  |
| Visit report completed/typed/uploaded. |  |
| CRM updated. |  |
| Details added to e-shot list (if prior permission is obtained). |  |
| Call pattern prompt actioned for future contact. |  |
| Actions logged and reminder set. |  |

#### Employer charter

**As an employer you can expect:**

* An accurate response to requests for information about any aspect of industry placements within 48 hours of receipt
* A named contact for liaison with us about industry placements
* Advice on how we can help to meet your needs through industry placements
* A Business Needs Analysis to be carried out by a trained member of our staff
* Qualified, competent, professional staff who will deliver a high-quality service at all stages of designing and running industry placements
* All of our staff to be involved in continuous quality monitoring leading to improvements in our standards of service
* Support for your staff involved in industry placements, e.g. supervisors and mentors
* Opportunities to comment and provide feedback on our service through surveys, personal contact or evaluation exercises
* Opportunities for being involved in regular reviews of our service
* A clear complaints procedure (copy available on request)
* Updates and information on developments within our organisation which may affect you.

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**What we ask of you:**

* Work with us to design and agree high-quality and safe industry placements which allow students to bring their learning to life
* Provide supervision and, if possible, a mentor to support the student whilst on the placement
* Keep us informed of any changes which could affect students
* Complete and return surveys and feedback forms to help us monitor and where necessary improve the service provided
* Acknowledge and respect our Equal Opportunities Policy (copy available on request).

#### Feedback questions

**Employers**

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| 1. What were your objectives for offering an industry placement? |
| 1. Did you achieve these objectives in full? |
| 1. If your objective was not achieved in full, what was not achieved and why? |
| 1. Rate the support provided by us on a scale of 1 (poor) to 5 (excellent):    1. Providing information about what is required from you when offering an industry placement    2. Helping your staff understand their role in industry placements    3. Helping you with health and safety, legal and insurance assessments    4. Identifying appropriate work and/or projects for the placement    5. Linking the placement experience with student’s classroom learning    6. Supporting the selection process    7. Providing ongoing support during the placement    8. Responding to your queries    9. Supporting with the mid- and end- reviews. |
| 1. Was the student appropriately prepared for the industry placement? If no, please suggest what other preparation would have been helpful. |
| 1. Was the student’s technical knowledge at the expected level at the start of the industry placement? If no, please tell us where it was not what you expected. |
| 1. What were the most beneficial aspects to you from having and industry placement student? |
| 1. What improvements would you recommend for industry placements in future? |
| 1. Would you be happy to provide a testimonial or case study to help to inform other employers about industry placements? |
| 1. Is there anything else you would like to add? |

**Students**

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| 1. To what extent did you meet your industry placement learning goals? |
| 1. If your learning goals were not achieved in full, what was not achieved? |
| 1. How well did the placement link to your classroom learning? |
| 1. Rate the support provided by us on a scale of 1 (poor) to 5 (excellent):    1. Providing information about the placements on offer    2. Ensuring that the employer was able to identify appropriate work / projects for your placement    3. Supporting you through the selection process    4. Providing ongoing support during the placement    5. Responding to your queries. |
| 1. Did you feel appropriately prepared for the industry placement? If no, please suggest what other preparation would have been helpful. |
| 1. Did you feel that you had enough technical knowledge at the start of the industry placement? If no, please tell us what you thought was missing. |
| 1. Did you find your mentor approachable, supportive and helpful? |
| 1. What were the most beneficial aspects you gained from your industry placement? |
| 1. What improvements would you recommend for industry placements in future? |
| 1. Would you be happy to provide a testimonial or case study to help to inform future students about industry placements? |
| 1. Is there anything else you would like to add? |